Promotions and Discounts

This document is the property of the **futura group** and is for use as a training guide only. To understand all the features available please refer to the current version of the Planning, Setting and User Guide.

Promotions

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Introduction

To support the wide range of promotions offered by the UK retail sector, Futura provides a broad range of functionality within its Price Change and Special offers modules.

There is scope to create special offers and discounts which be either applied automatically or manually at the Point of Sale.

It is important to note that promotions are different to price changes which are permanent in nature. The functions in Futura allow for promotional events to be pre-planned for specific dates. At the end of the assigned dates the normal ticket price of the item will return automatically. It is also possible to set any promotion to be branch specific, so a promotion may run in some stores but not others.

When a discount has been applied to an item, it is indicated to the sales personnel at the till by highlighting the line green. If required there are also technical settings which can be entered to prompt a message.

Which Screen?

There are a number of screens to manage promotions and selecting the right option depends on the type of promotion that is required.

The following Screens will create promotions that will be **Automatically** applied at the POS.

- **Promotion on Total**

  Allow for the discount by either a fixed amount or a percentage based on spending thresholds.

  e.g. Spend £50 get 10% off.

- **Promotion Qty and Price**

  Sell one or more of the exact same item for a promotional price.

  e.g. Item is currently reduced by 10%.

- **Promotion Mix and Match**

  Any different products can be mixed together resulting in a promotional price

  e.g. Buy one get one free / Buy one get something different free.

- **Discount Rules** (also available to run manually)

  Can be used for automatic staff discounts and specific customer account discounts

- **Voucher/coupon redemption**

  Pre-printed promotional vouchers or coupons can be scanned at the till to apply a discount.

The following screens relate to discounts **Manually** applied at the POS.

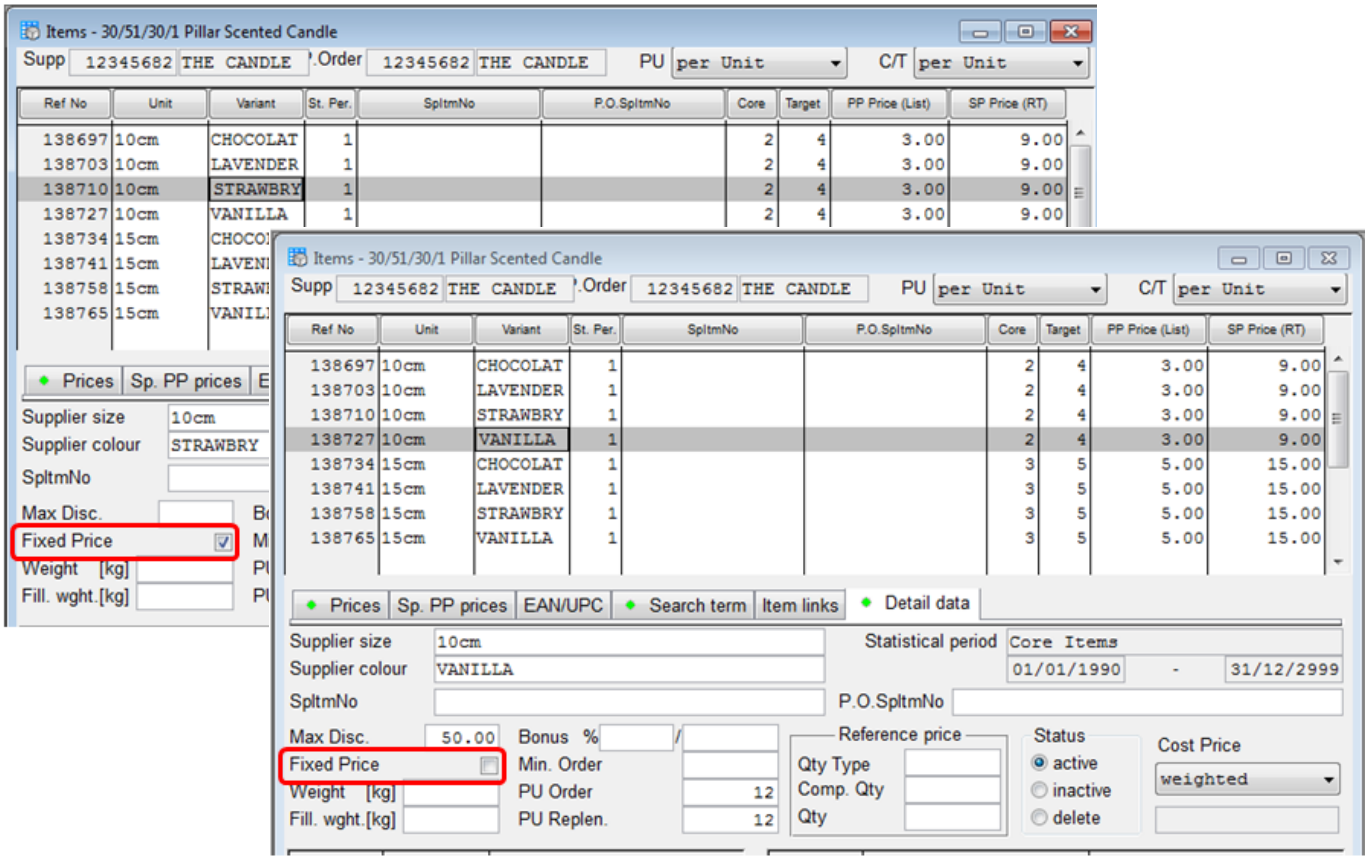
- **Discount Rules** (also available to run automatically)
- **Price Change Reason Codes**

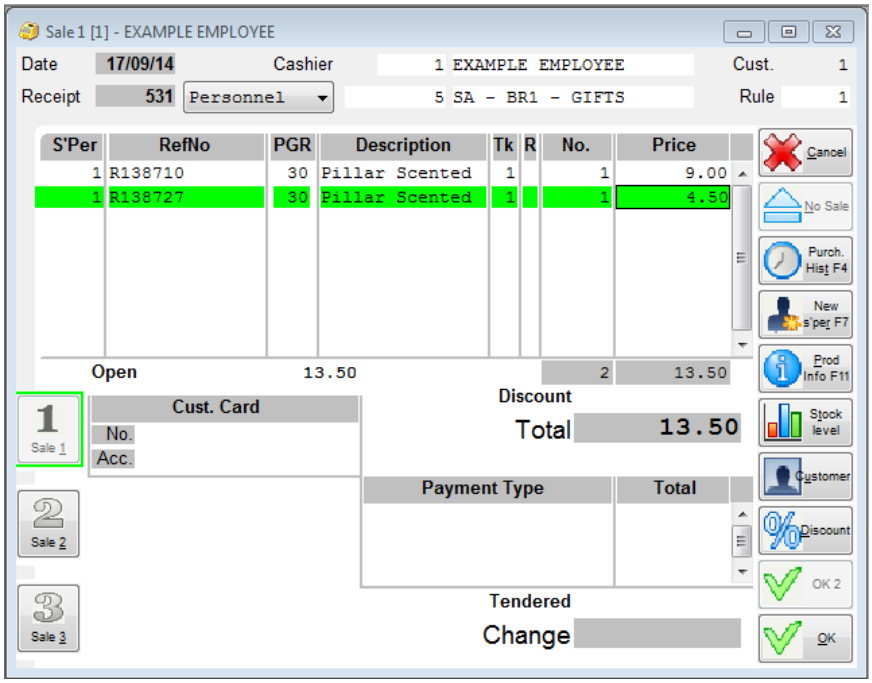
Fixed price items

Do items with Fixed Prices still get discounted in a promotion or discount?

If an item has the Fixed Price tick box activated in the Detail Data tab, then it will not take part in the any type of promotion set up or discount rule.

This is displayed below;

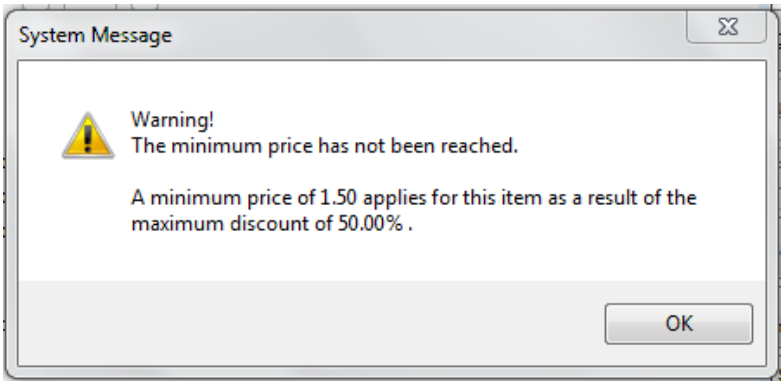




Maximum discounts

Items with maximum discount in automatic promotions

If a maximum discount has been entered against an item (e.g. 50%) in the reference data and a member of staff attempts to reduce an item over this amount (e.g. 60%), then the following message will be displayed;



If an item has been added to a promotion, then the system will ignore this maximum discount automatically and this message will not be shown.

Price Change Reasons

Price Change Reason are used to capture why an item has been discounted, which are then printed on the receipt and captured for analysis. This can be applied manually, or automatically as part of a triggered promotion/discount at the till.

These Price Change Rules can be used for the following selling functions:

- Tills (There is a setting in Base POS to make this a mandatory requirement)
- Customer Ordering (There is a setting in Base Order to make this a mandatory requirement)

For till point discounts, the Price Change Reason captured can then be used to see how often it was used and the total of the price reductions. These can be analysed in:

- POS Daily Analysis → Sale Statistics

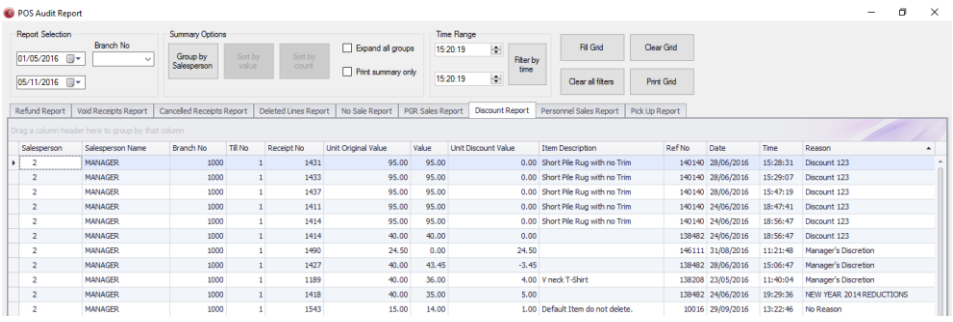
Futura Retail Solutions Ltd. Page : 1
RG8 8ER Reading Sales Statistics - Total 05/11/16 15:18

Evaluation period: 01/05/2016 - 05/11/2016 23:59:59
Branch: All
POS : All
Currency £ Pounds Sterling

From	to	Item	Rcpts	Total	Itm/Rct	Sls/Rcpt	Cust.	Quote
00:00	01:00	120.00	14	3186.58	8.57	227.61	0	0
09:00	10:00	2.00	2	17.50	1.00	8.75	0	0
10:00	11:00	5.00	3	99.00	1.67	33.00	0	0
11:00	12:00	34.00	9	184.25	3.78	20.47	0	0
12:00	13:00	17.00	13	190.52	1.31	14.66	0	0
13:00	14:00	6.00	5	161.15	1.20	32.23	0	0
14:00	15:00	7.00	4	105.98	1.75	26.50	0	0
15:00	16:00	11.00	10	928.99	1.10	92.90	0	0
16:00	17:00	1.50	2	14.50	0.75	7.25	0	0
17:00	18:00	7.00	5	281.36	1.40	56.27	0	0
18:00	19:00	6.00	3	405.00	2.00	135.00	0	0
19:00	20:00	2.00	1	111.00	2.00	111.00	0	0
20:00	21:00	1.00	1	1.09	1.00	1.09	0	0
21:00	22:00	2.00	1	104.50	2.00	104.50	0	0
Total :		221.50	73	5791.42	3.03	79.33	0	0

Shrinkage Reason		Qty	Altered	Original	Discrepancy
0		19	131.45	174.95	43.50
1	Discount 123	24	1827.00	1905.00	78.00
2	Manager's Discretion	7	276.80	292.50	15.70
9	NEW YEAR 2014 REDUCTIONS	1	35.00	40.00	5.00
15	Promotion	3	112.00	137.00	25.00
		54			167.20

- POS Audit Reports (If installed)



- Specially built Analyser reports

In the automatic discounting functions, a discount reason can be given for the following modules:

a) Promotion on Total
b) Promotion By Qty & Price
c) Promotion Mix & Match
d) Discount Rules
e) Scanned Barcodes
f) Payment Types (only used in specific set ups)

Please note: If a promotion or discount record is created and a reason is not applied against it, then this will be reported as a '0' rule in the POS Daily Analysis: Sale Statistics report.

Restricting Price Change Reason search lists at the till

From Version 3.32B it is possible to restrict the number of Price Change Reason that are searchable at the till. This enables you to control the discounting options available at the till point so that only valid discounts reasons are applied to transactions.

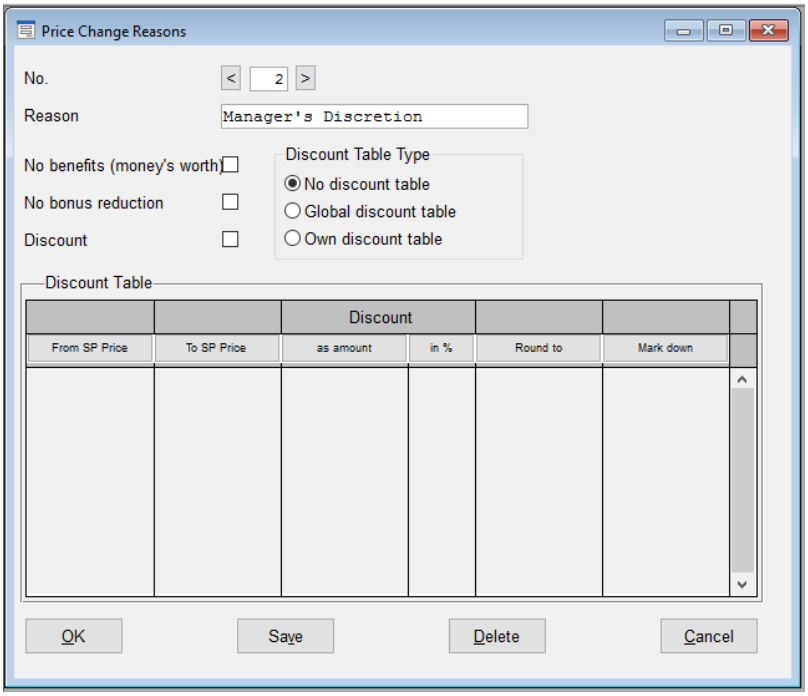
This involves a configuration setting. It you are interested in utilising this functionality, please speak to the Futura Support Team.

PLEASE NOTE: This is not available in version 3.32A or older.

Step by Step: Creating a price change reason without discount tables.

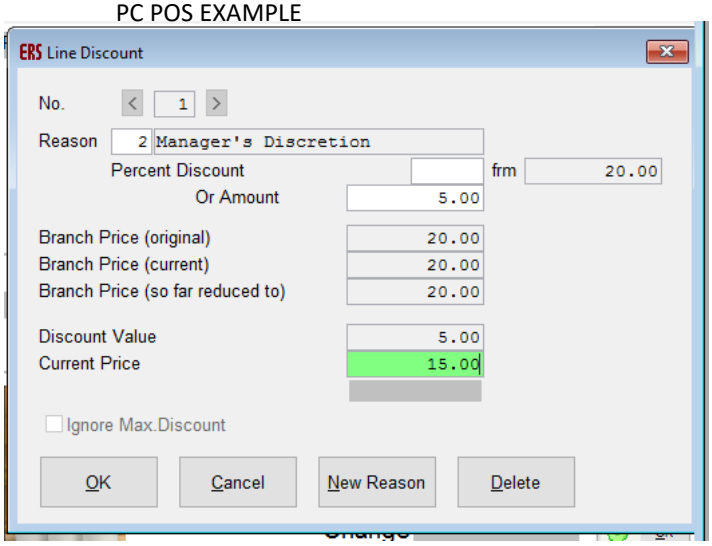
1. Open the Price Change Reason Module
2. Select the next new number price change reason and enter the reason description
3. Select 'NO DISCOUNT TABLE'
4. Press Save and OK.

Example Setup

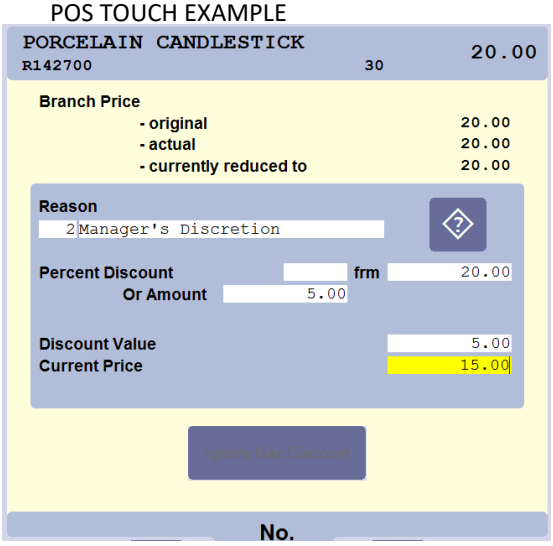


When this rule is used at the till point, the cashier is able to enter the discount, without any rule restrictions.

PC POS EXAMPLE



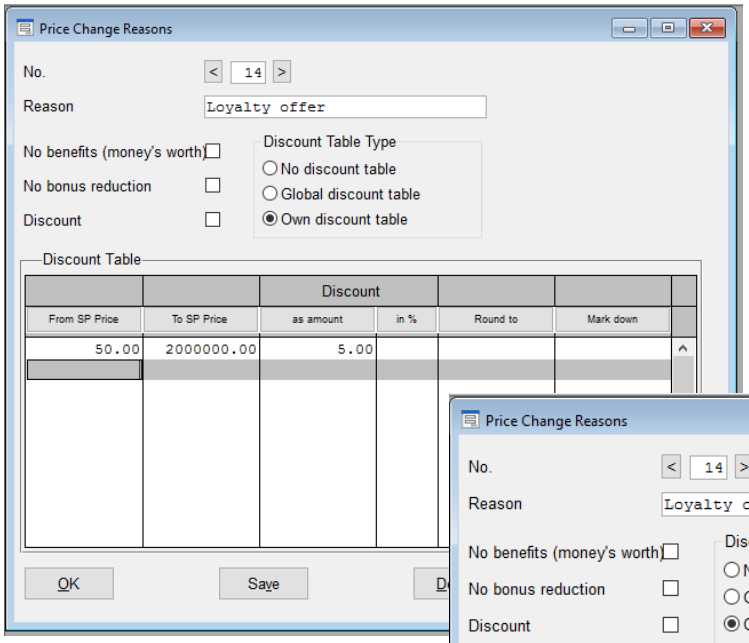
POS TOUCH EXAMPLE



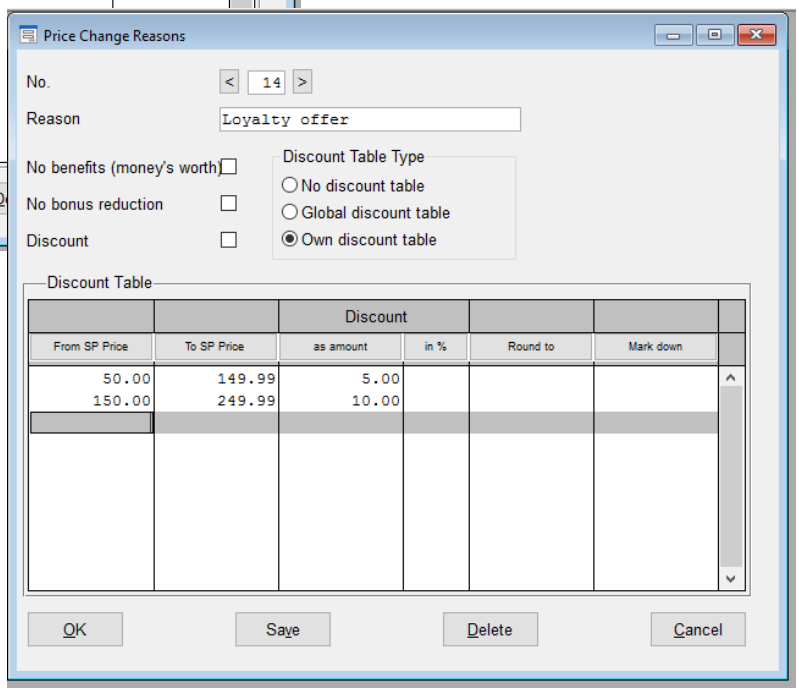
Step by Step: Creating a price change reason with discount tables. (e.g. £5 off)

1. Open the Price Change Reason Module
2. Select the next new number price change reason and enter the reason description
3. Select 'OWN DISCOUNT TABLE'
4. In the Discount Table: From SP, enter how much the customer must spend as a minimum before this discount can be applied
5. In the Discount Table: To SP, enter how much the customer must spend as a maximum before the next level of discount kicks in if you have multiple level rules.
   (I recommend entering something in this field, even if it is a one level discount like below)
6. In the Discount Table: As Amount field, enter how much money should be taken off.
7. Press Save and OK.

Example: Single Level Set-up

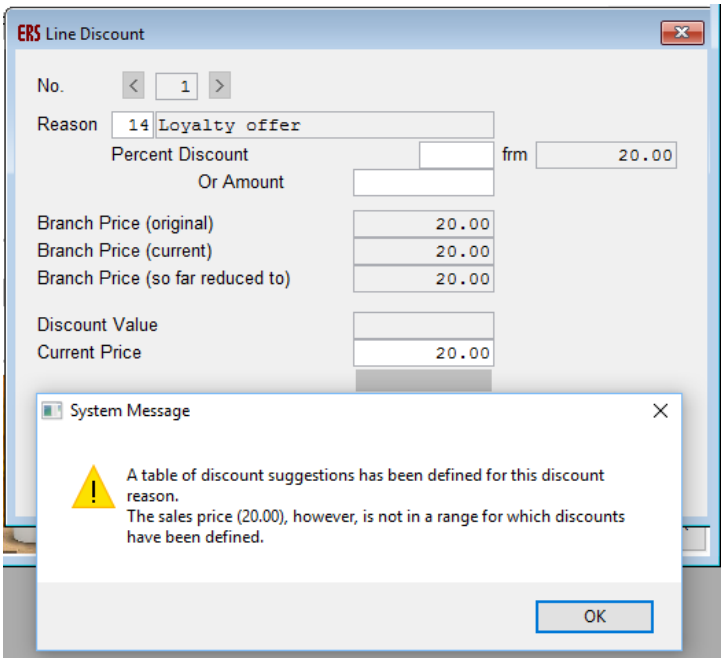


Example: Multi Level Set-up

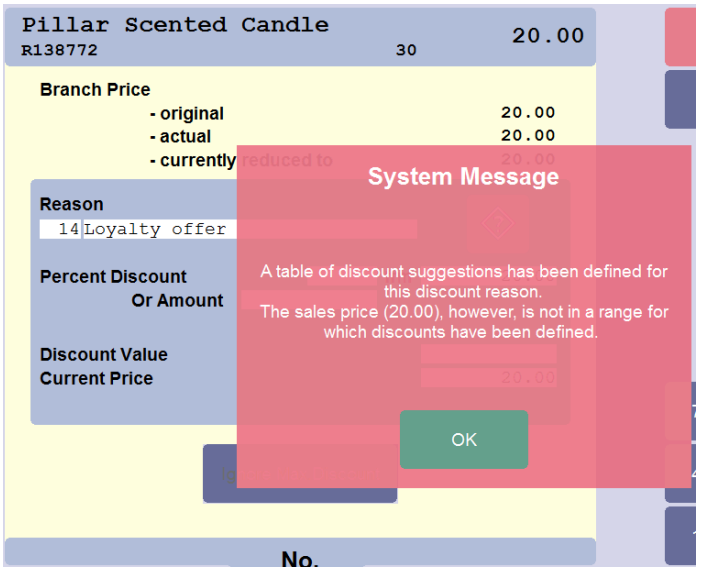


- If the cashier attempts to apply the discount to an INVALID transaction, then the following message will be displayed and the discount will not be applied.

PC POS EXAMPLE

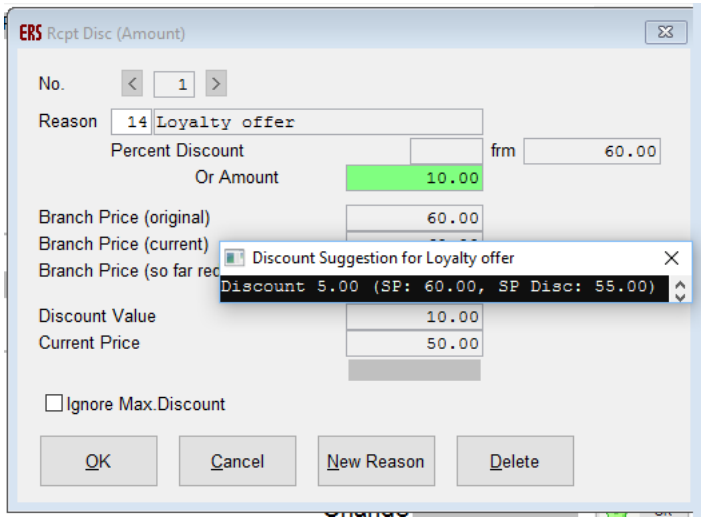


TOUCH POS EXAMPLE



- If the cashier attempts to apply the discount to a VALID transaction, then the following screens will be displayed and the discount will be applied.

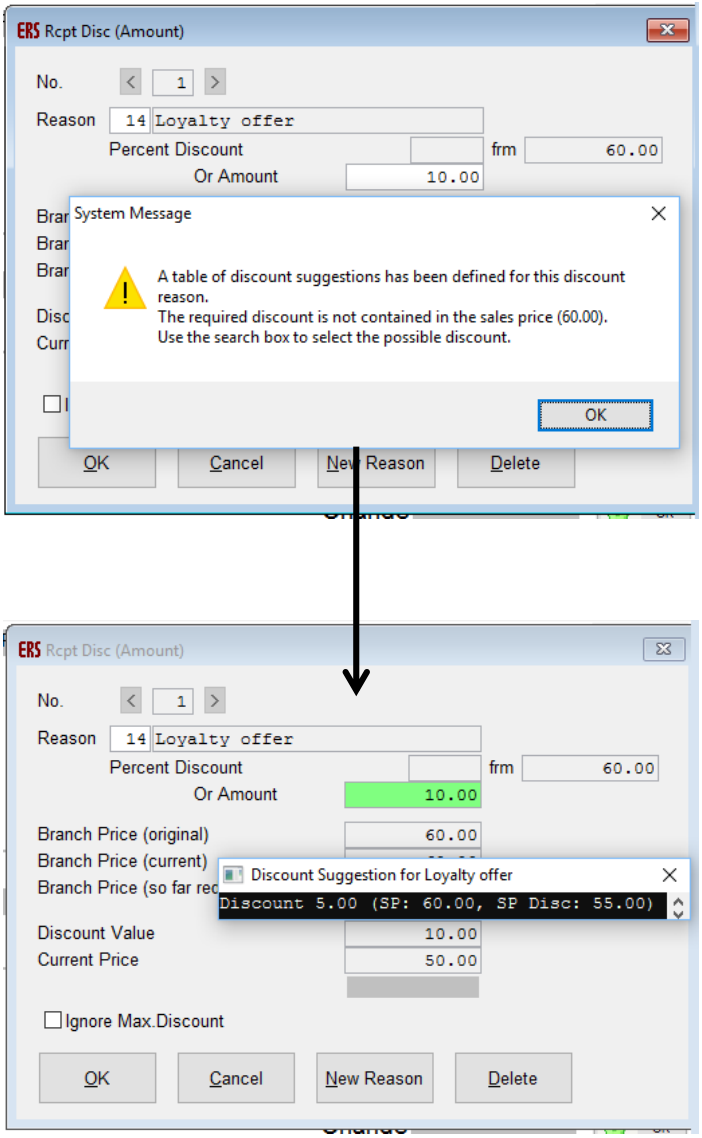
PC POS EXAMPLE



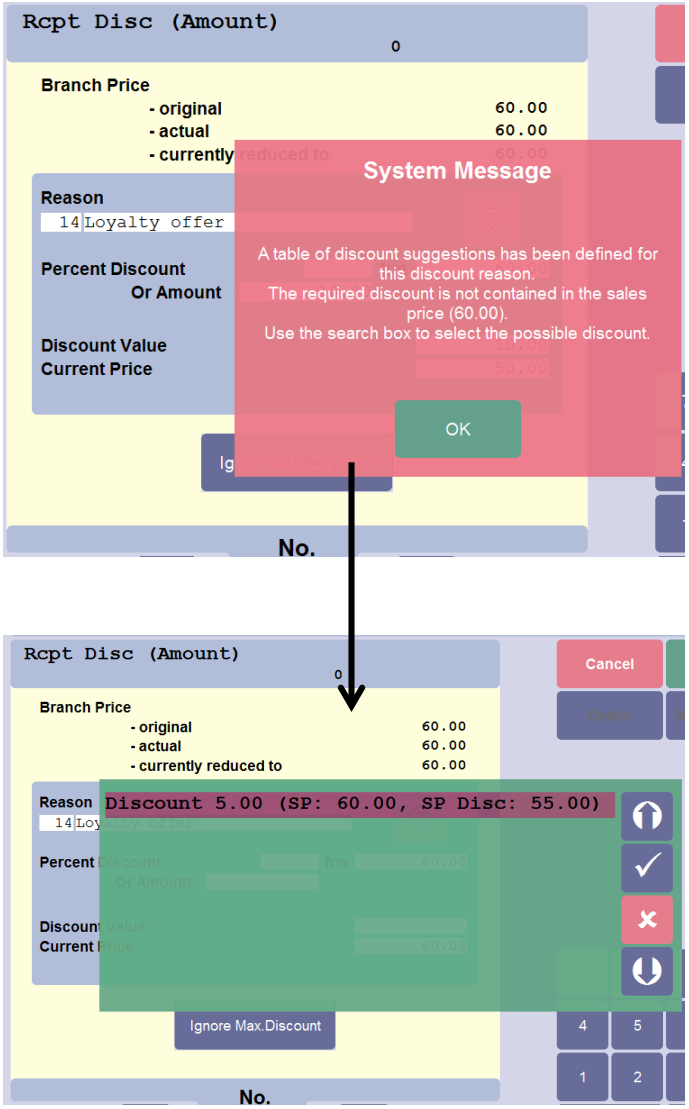
TOUCH POS EXAMPLE

If the cashier then attempt to change the discounted quantity that the table has applied, the following system message will be displayed. The valid price range discounts wll then be displayed again for the cashier to choose from.

PC POS EXAMPLE



TOUCH POS EXAMPLE



New promotion functionality from Version 3.26B onwards

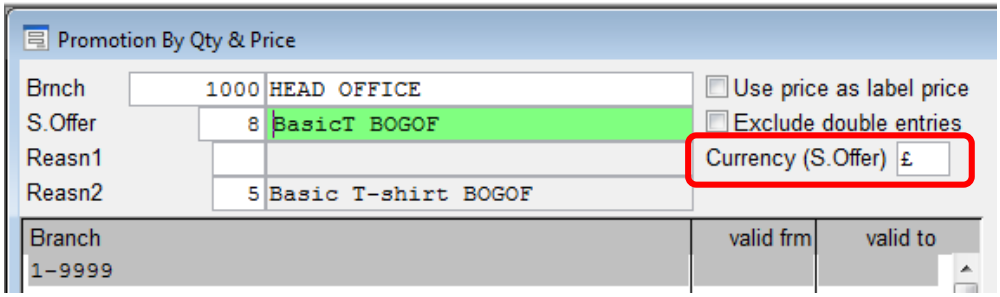
Currency for promotion prices

From version 3.26B, there have been some general modifications regarding promotion prices - especially with respect to the definition of promotion price changes for foreign-currency branches.

This affects the following functions:

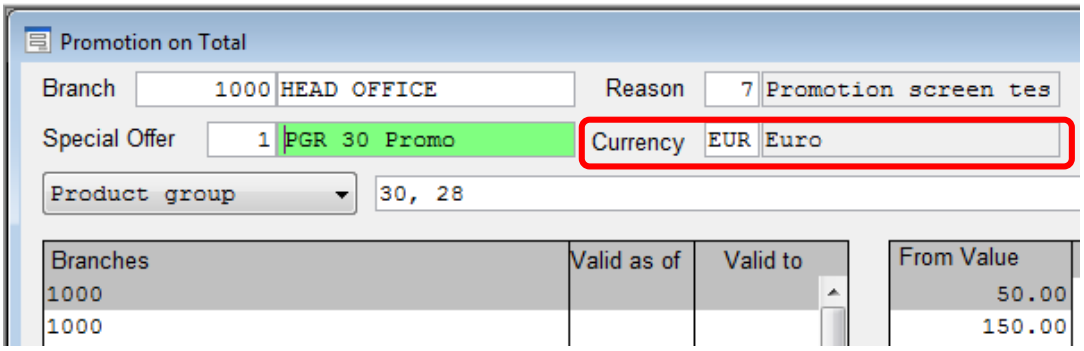
- Promotion by Qty & Price
- Promotion Mix & Match
- Promotion on Total

The three functions for defining promotion prices have been given a new currency field on the entry mask for the "promotion currency".

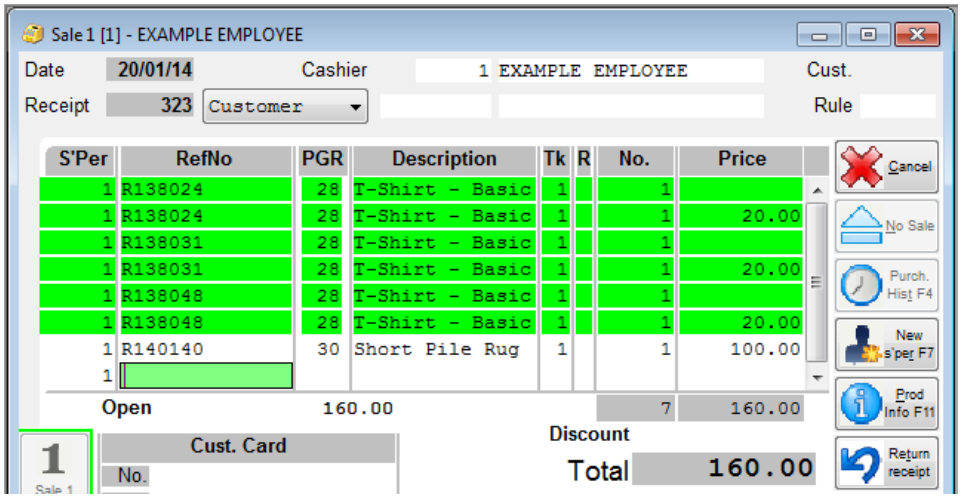


For foreign-currency branches this means:
In the head office, promotion prices can be created with a specified system currency against them. This acts as an additional filter. So, a branch will only take part in a special offer, where its Base System matches the Currency (S. Offer) field. This can be especially useful when 'fixed' prices are set directly in promotions, which is only valid for a specific currency or country.

Example: The following example uses the same transaction information as the example for Promotion on Total above. However, a currency has now been entered against this promotion below.



The same products are now scanned, however, as you can see, only the 2 for 1 offer is applied. This is because Branch 1000 is not using a EUR currency in its Base System, so is no longer a valid branch for this promotion.



Filtering with item attributes

From Version 3.26B it is possibly to use Item Attributes in the following screen as additional item filtering options:

- Promotion Qty and Price
- Promotion Mix and Match

(Please note, it is already possible to use item attributes as filters in Promotion on Total and Discount Rule)

If you are on this version or higher and cannot see the attribute filters on the screen, please speak to the Futura Support Team about placing in the following configuration settings.

[WAWI] PAE_EXTENDED_MIXMATCH = 0/1
[WAWI] PAE_EXTENDED_QTYPRICE = 0/1
=0: Mask without extended item attribute functionality.
=1: Mask with extended item attribute functionality

If this function is activated for the Promotion Mix and Match module, an additional filter is also activated which enables the user to enter reference numbers into one row which do not necessarily. This can help avoid adding grouping markers on items, and avoid having to set up multiple combination types for the one offer.

These are explained further within the separate sections in this document.

Promotion By Qty & Price – entering zero values

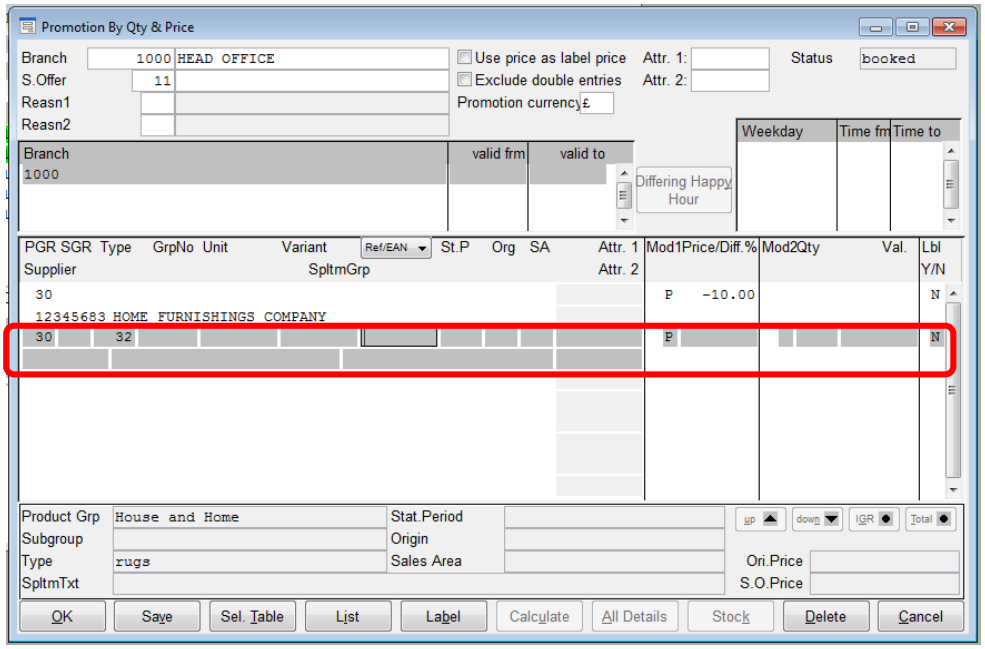
From version 3.26B, there is a technical setting allows for a zero value to be entered in the Promotion by Quantity and Type screen.

[WAWI] *PAE_AKTION_NULLWERT = 0/1*

0 *= Zero values not allowed*

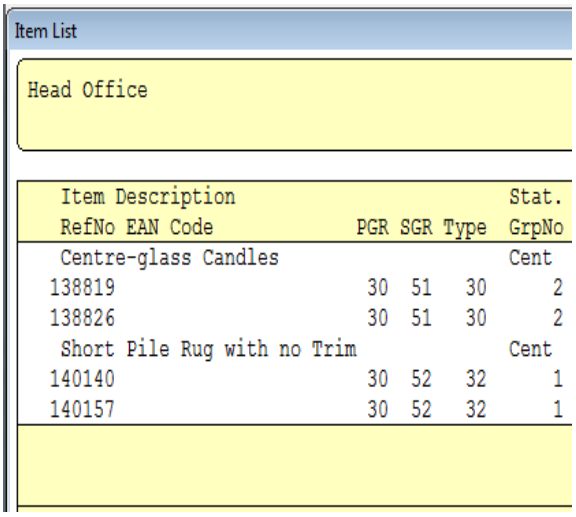
1 *= Zero values are allowed*

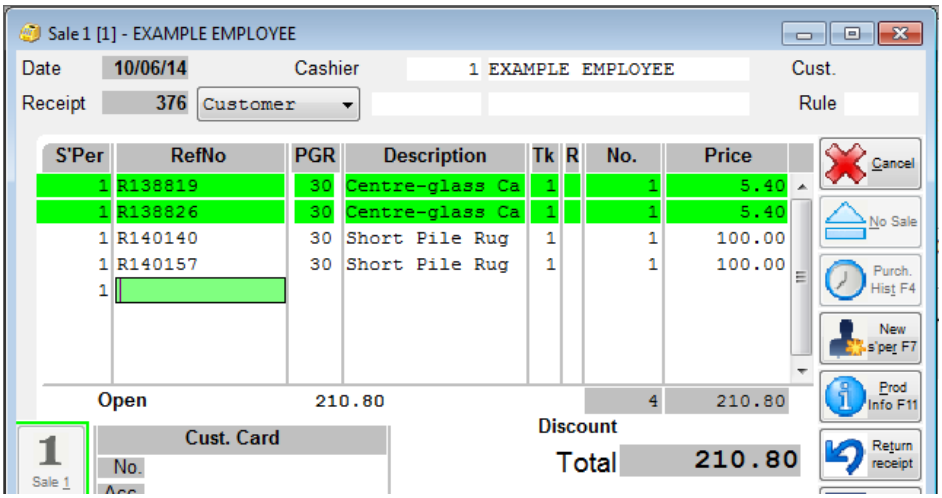
This means that it is now possible to enter a sales price of £0.00 to be entered in either Mode 1 or Mode 2, without a system message.



This is can be used to create exceptions, as is displayed in screenshot on the previous page.

This is promotion has been setup to give a 10% discount on all items in House and Home, for supplier 12345683, except rugs.





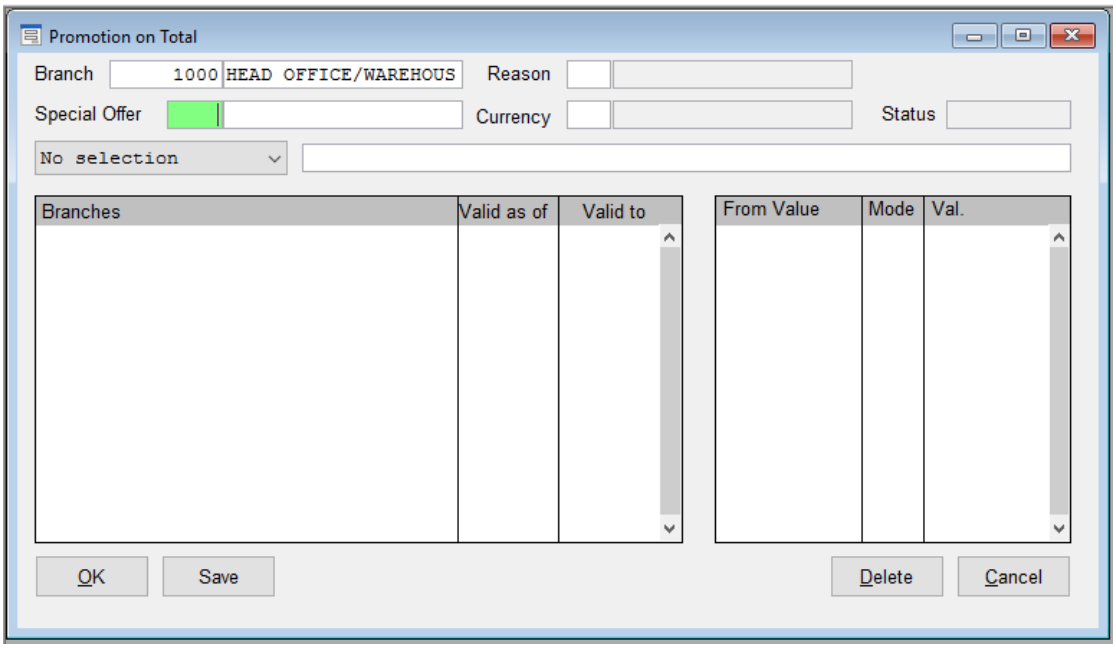
In the example above, four items have been entered into a transaction. All items are from PGR 30, however, the discount has only applied to two items (R138819, 138826) which is indicated by the green lines.

Items R140140 and R140157 have not had a discount applied. By looking at the Item List screenshot included, these two items have a Type of 32, meaning they fall into the set criteria in the Promotion Qty and Type screen of a 0% discount.

Promotion on Total (from version 3.24 onwards)

From Version 3.24 onwards, a module was added entitled Promotion on Total.

The "Promotion Total" function is used to create definitions for granting discounts when a certain amount of money has been spent.



They are only available for use at the tills in store.

Be aware that any items set as a “fixed price” will be ignored in the Promotion on Total.

What categories are available to enter into the Item Selection?

The categories that are available to be used as item selection criteria are;

- Product Group
- Sub Group
- Type
- Origin
- Sales Area
- Supplier
- Statistical Period
- Item Attributes

Step by Step: How to create a percentage off offer

Examples Spend £50 and get 10% off

Spend £50 and get 10% off

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

1. Open the Promotion by Total screen.
2. Find out the next blank special order number. (this can be done by entering '1 ' and using the search function. Choose a number that is not visible in the menu up to 999999 characters and press ESC to exit the menu)

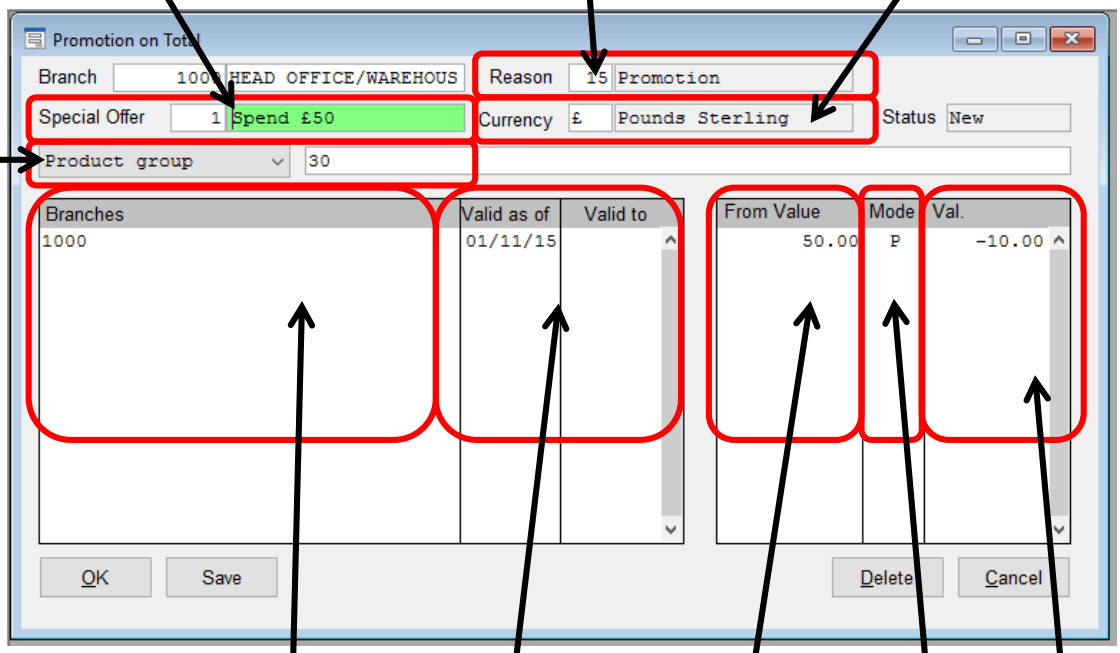
3 Enter the special order number and press Enter

4 Add your offer description and press Enter.

5 Add Reason code to be recorded against transactions.

(You can use the search function to bring up a list of current reasons)

6 From 3.26B, enter the branch currency restriction.



8 Enter the category filters in the field beside the dropdown.

7 Choose from the category dropdown if you would like to apply filters

9 Enter your branch range(s) that you would like this offer to be valid in and press Enter.

10 Enter the valid from and to dates and press Enter (if either the from date is blank, the offer will be after from the next polling. If the to date is blank, this offer will remain active until it is deleted or this field is populated.

12 Enter the minimum value the customer must spend.

13 Enter in the Mode column and enter 'P'.

14 Enter the percentage value the items should be discounted by.

(A negative value should be entered)

15. Press [SAVE] and [OK]

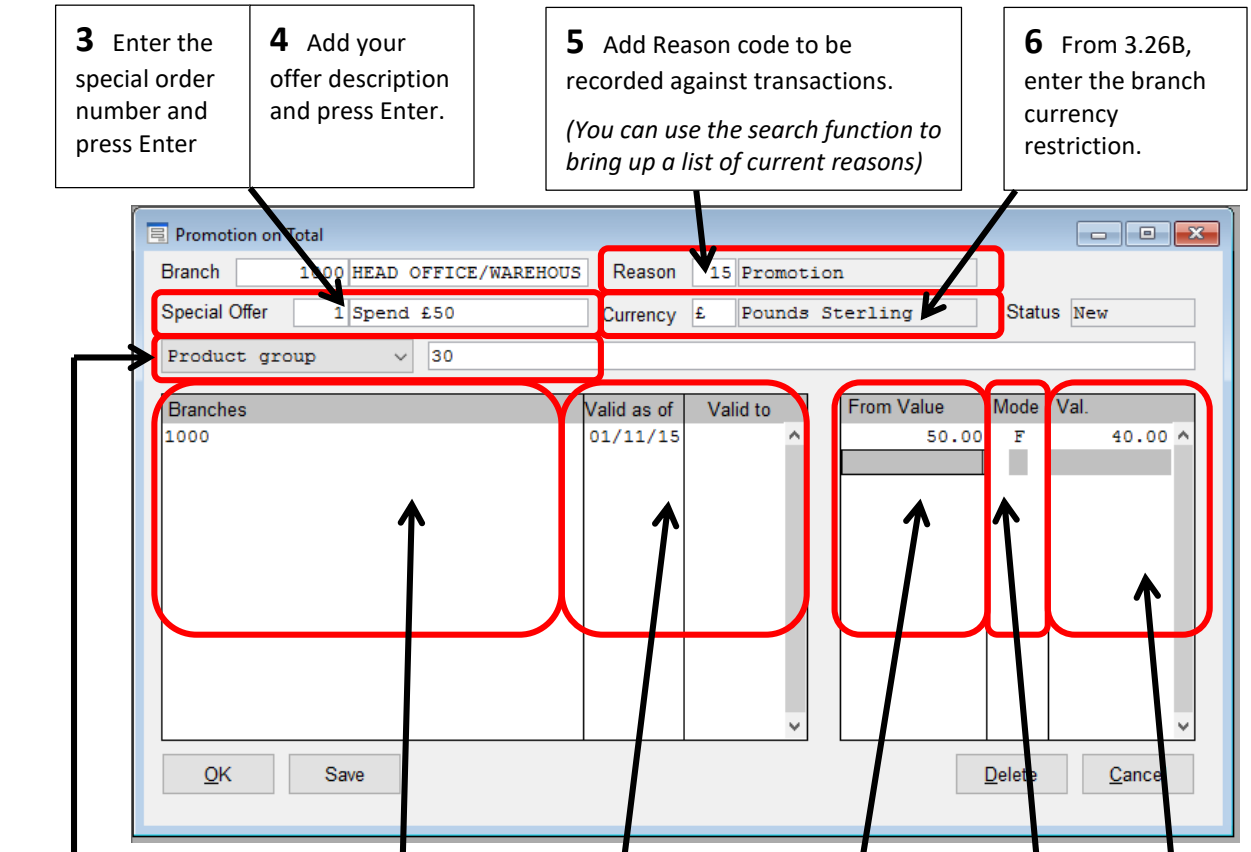
Step by Step: How to create a fixed price offer

Examples - Spend £50 or over and pay £40

Spend £50 and pay £40

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

1. Open the Promotion on Total screen.
2. Find out the next blank special order number. (this can be done by entering '1 ' and using the search function. Choose a number that is not visible in the menu up to 999999 characters and press ESC to exit the menu)



3 Enter the special order number and press Enter

4 Add your offer description and press Enter.

5 Add Reason code to be recorded against transactions.

(You can use the search function to bring up a list of current reasons)

6 From 3.26B, enter the branch currency restriction.

8 Enter the category filters in the field beside the dropdown.

7 Choose from the category dropdown if you would like to apply filters

9 Enter your branch range(s) that you would like this offer to be valid in and press Enter.

10 Enter the valid from and to dates and press Enter (if either the from date is blank, the offer will be after from the next polling. If the to date is blank, this offer will remain active until it is deleted or this field is populated.

12 Enter the minimum value the customer must spend.

13 Enter in the Mode column and enter 'F'.

14 Enter the value the items should be sold at.

(A positive value should be entered)

15. Press [SAVE] and [OK]

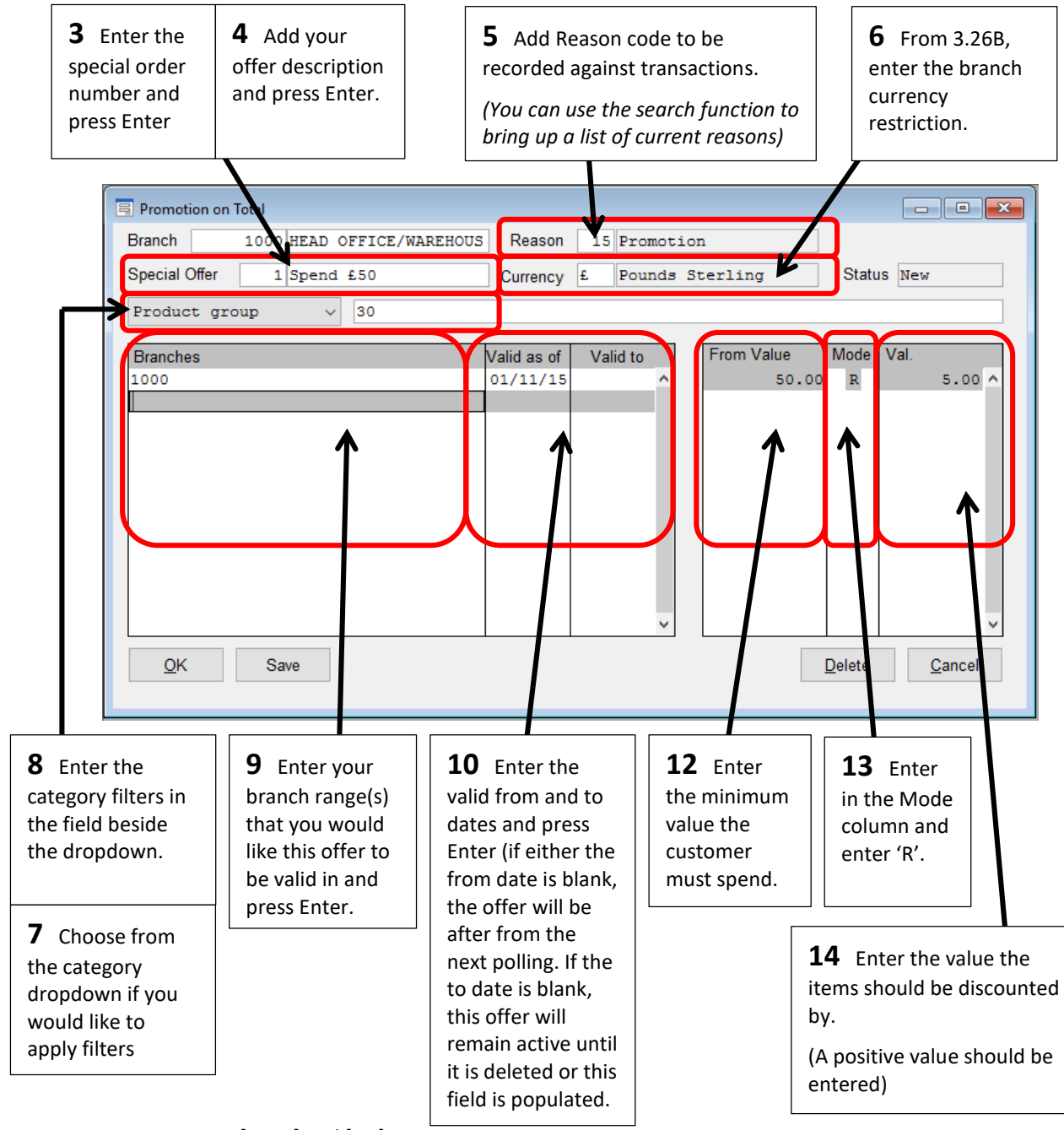
Step by Step: How to create a money off offer

Examples - Spend £50 or over and get £5 off

Spend £50 and get £5 off.

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

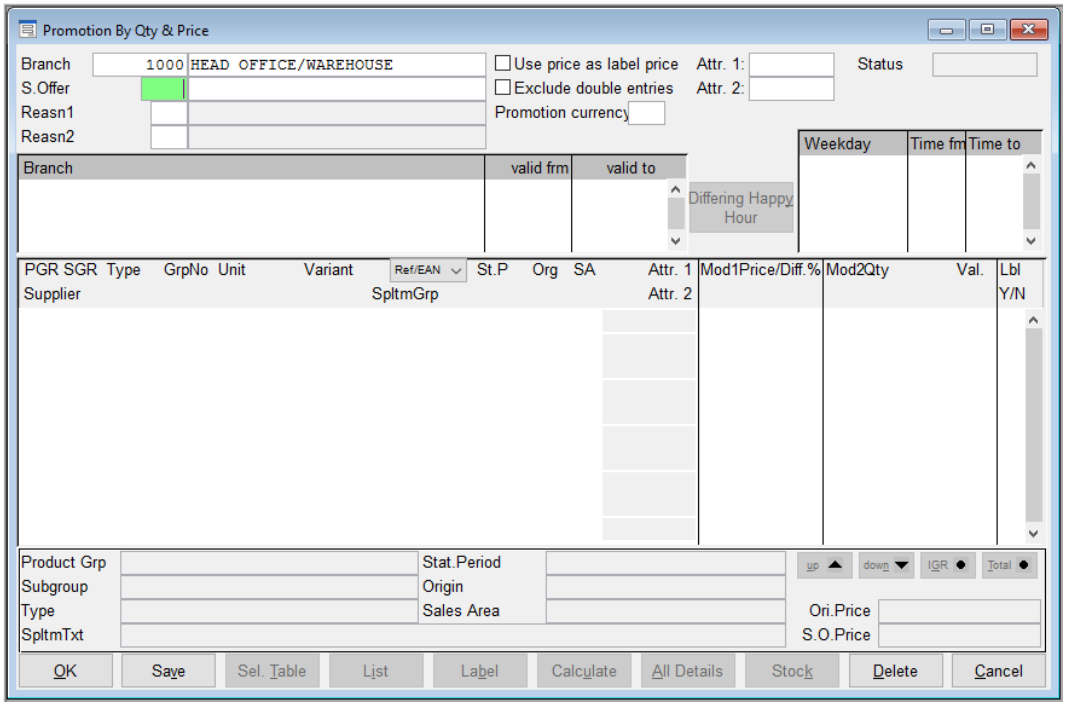
1. Open the Promotion on Total screen.
2. Find out the next blank special order number. (this can be done by entering '1 ' and using the search function. Choose a number that is not visible in the menu up to 999999 characters and press ESC to exit the menu)



15. Press [SAVE] and [OK]

Promotion Quantity & Price

The "Promotion Quantity & Price" function is used to create definitions for granting discounts on individual items based on prices and quantities and which may be valid for different periods of time.



They are only available for use at the tills in store.

Be aware that any items set as a “fixed price” will be ignored in the Promotion Quantity & Price.

What categories are available to enter into the Item Selection?

The categories that are available to be used as item selection criteria are;

- Product Group
- Sub Group
- Type
- Group Number
- Unit
- Variant
- Reference Number (Futura SKU)
- Origin
- Sales Area
- Supplier
- Supplier Item Group
- Supplier Item Number
- Statistical Period
- Item Attributes (with number value options)

NOTE: It is recommended to keep one of these fields (usually Origin or Sales Area) free to be used to group items together for promotions

This can be especially useful in Promotion Qty and Price is a promotion is being held on a whole range of items. E.g. 10 % off selected items. This can help entering all SKU’s in unnecessarily and is only entered into one line of the promotion, see screenshot below. This means an item can be removed from a promotion easily by simply removing the grouping field.

Which Mode columns should you use?

When setting up Promotion Qty and Price, a decision needs to be made as to whether you need to use the Mode 1 columns or the Mode 2 columns.

- **Mode 1**

This will be applied EVERY TIME that item(s) is scanned.

It is a single unit discount and uses the Reason Code 1 field to link the price change reason.

F	The value will be a new fixed price of an item.
P	The value enter will be the percentage taken off of an item. (Positive value means mark-increase)
R	The value enter will be the amount taken off of an item. (Positive value means mark-down, a negative means a mark-up.)

These options are shown as examples in this document.

- **Mode 2**

This is used to control the number of items the customer must purchase before the promotion is applied.

The is not a mix and match promotion, which means that the customer MUST buy the exact quantity of the exact same item reference number. If you would like to offer the customer a number of different item options for this promotion, it should be set up in the Promotion Mix and Match module.

This uses the Reason Code 2 field to link the price change reason code.

There are 7 different Mode 2 types of promotion that can be created in this area. They all apply to a reference number been scanned a certain quantity of times in a single transaction.

N	Unit discount - When 'X' units of an item are sold for 'Y' number of units. E.g. 3 for 2 on a single item. Mix and match is not possible.
P	Percentage discount - When more than 'X' pieces are sold, then all units of that item will be changed by 'Y' percentage.
%	Percentage discount – When more than 'X' pieces of an item are sold, then any pieces above that number for this item will be discounted by 'Y' percentage. Any pieces below that number for that item will still be full price.
F	Fixed price discount – When more than 'X' pieces of an item are sold; then all items will be sold for a fixed price of 'Y' amount.
W	Fixed price discount – When more than 'X' pieces of an item are sold, then any pieces above that number for this item will be sold at a fixed price of 'Y' amount. Any pieces below that number for that item will still be full price.
A	Mark down discount - When more than 'X' pieces are sold, then all units of that item will be reduced by 'Y' amount.
R	Mark down discount - When more than 'X' pieces of an item are sold, then any pieces above that number for this item will be reduced by 'Y' amount. Any pieces below that number for that item will still be full price.

These options are not shown as examples in this document.

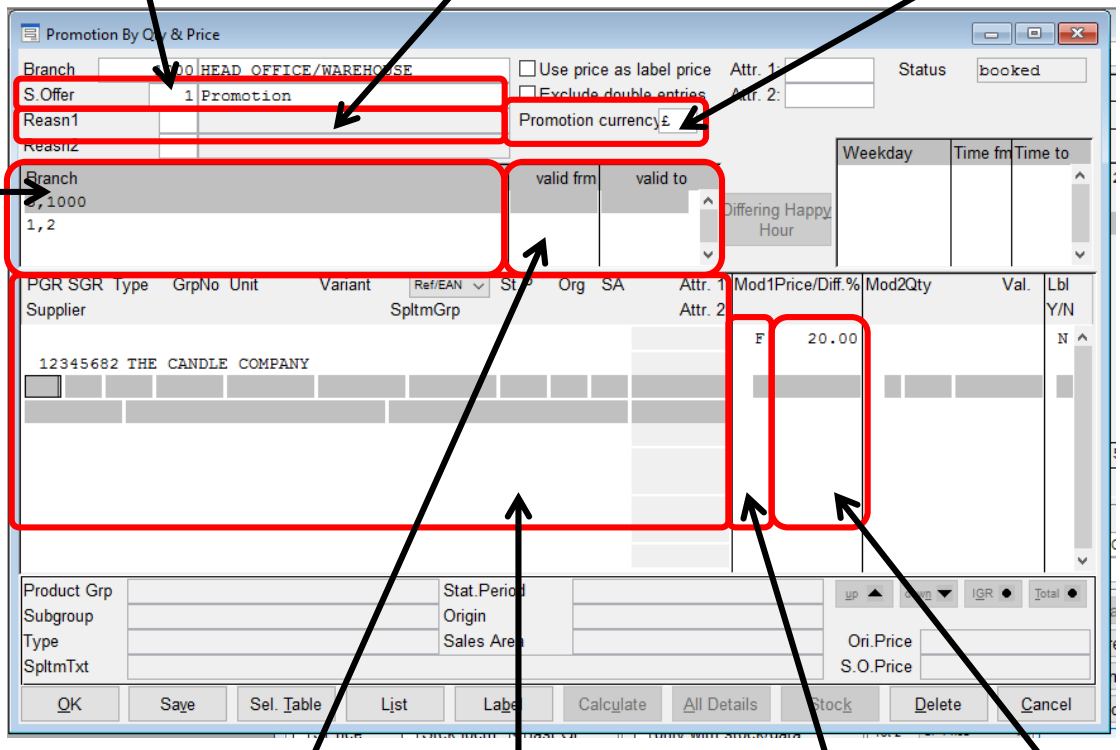
Step by Step: MODE 1 - How to create a fixed price offer?

Examples Item is a fixed price £x value.

Item is a fixed price of £20

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

1. Open the Promotion Qty & Price screen.
2. Find out the next blank special order number. (this can be done by entering '1 ' and using the search function. Choose a number that is not visible in the menu up to 999999 characters and press ESC to exit the menu)



3 Enter the special order number and press Enter

4 Add your offer description and press Enter.

5 Add Reason code to be recorded against transactions.

(You can use the search function to bring up a list of current reasons)

6 From 3.26B, enter the branch currency restriction.

7 Enter your branch range(s) that you would like this offer to be valid in and press Enter.

8 Enter the valid from and to dates and press Enter (if either the from date is blank, the offer will be after from the next polling. If the to date is blank, this offer will remain active until it is deleted or this field is populated.

9 Enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

10 Enter in the Mode column and enter 'F'.

11 Enter the value the items should be sold at.

(A positive value should be entered)

12. Press [SAVE] and [OK]

Step by Step: MODE 1 - How to create a percentage offer?

Examples - 20% off an item

- 50% off an item

20% off any candle

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

1. Open the Promotion Qty & Price screen.
2. Find out the next blank special order number. (this can be done by entering '1 ' and using the search function. Choose a number that is not visible in the menu up to 999999 characters and press ESC to exit the menu)

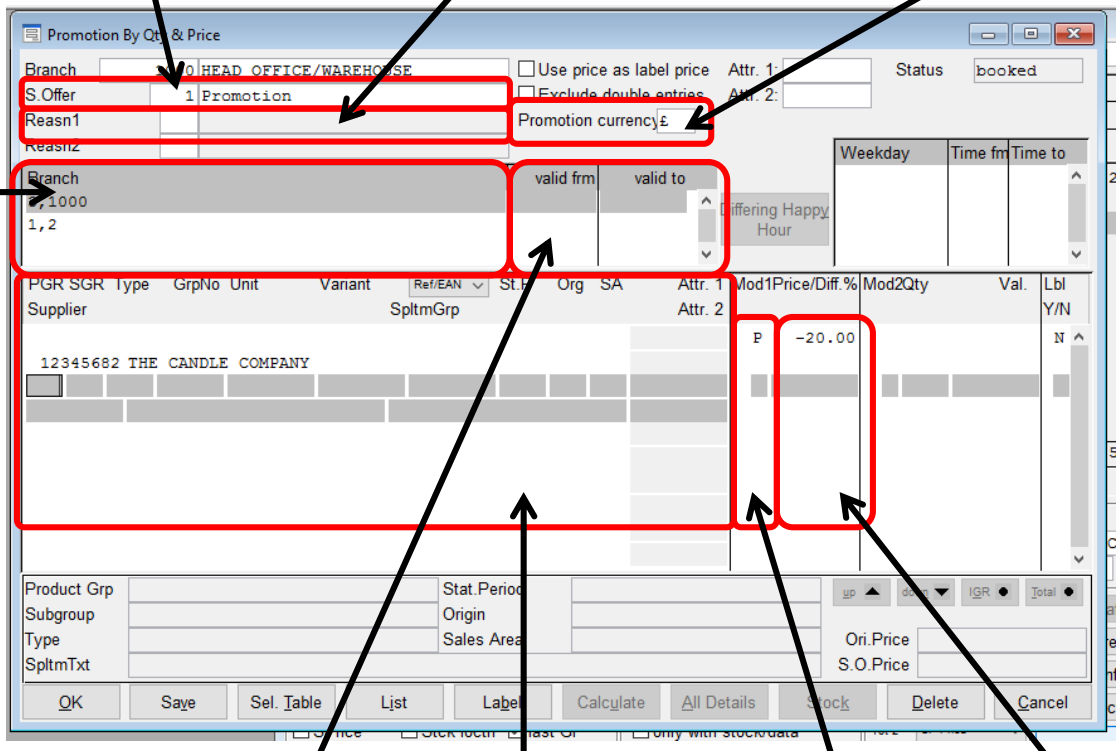
3 Enter the special order number and press Enter

4 Add your offer description and press Enter.

5 Add Reason code to be recorded against transactions.

(You can use the search function to bring up a list of current reasons)

6 From 3.26B, enter the branch currency restriction.



7 Enter your branch range(s) that you would like this offer to be valid in and press Enter.

8 Enter the valid from and to dates and press Enter (if either the from date is blank, the offer will be after from the next polling. If the to date is blank, this offer will remain active until it is deleted or this field is populated.

9 Enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

10 Enter in the Mode column and enter 'P'.

11 Enter the percentage the items should be discounted by.

(A negative value should be entered)

12. Press [SAVE] and [OK]

Step by Step: MODE 1 - How to create a money off offer?

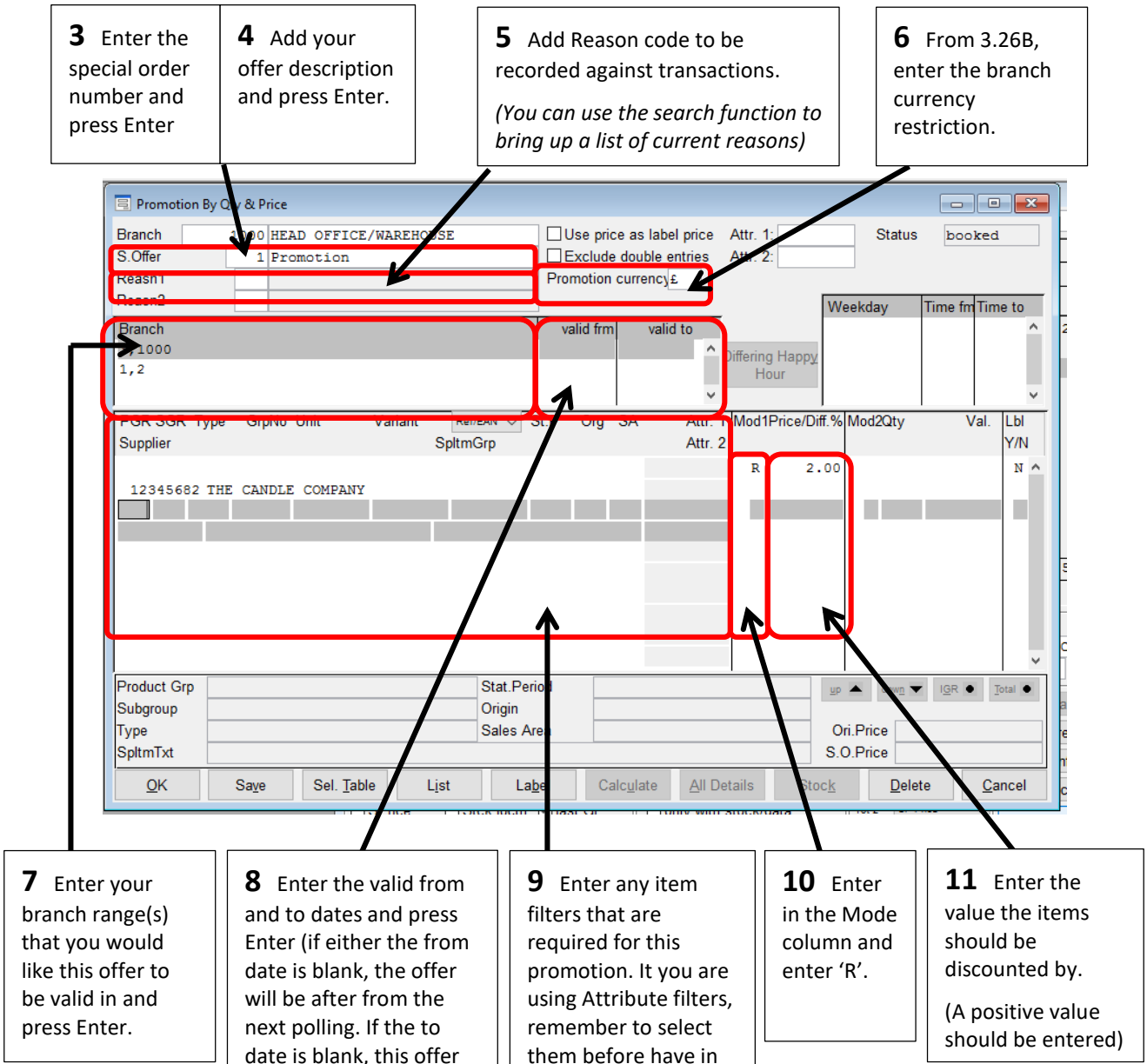
Examples Item is reduced by £x.xx amount the full price

Item is increase by £x.xx of the full price

Item is 'X' value

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

1. Open the Promotion Qty & Price screen.
2. Find out the next blank special order number. (this can be done by entering '1 ' and using the search function. Choose a number that is not visible in the menu up to 999999 characters and press ESC to exit the menu)



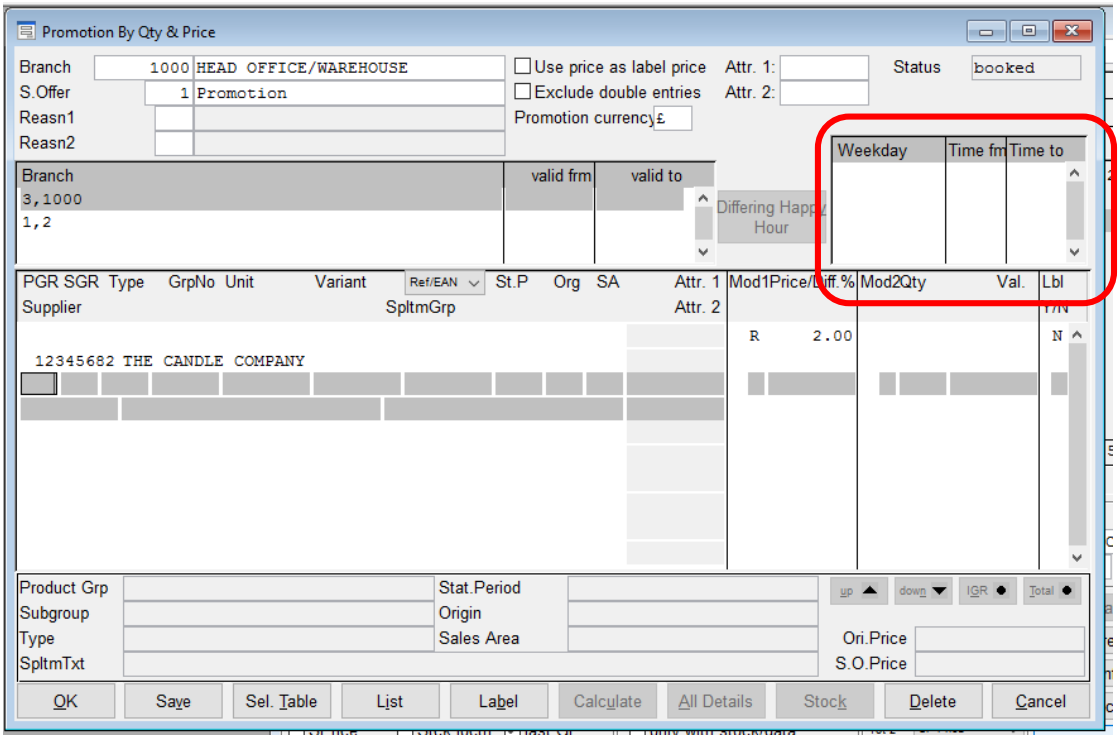
12. Press [SAVE] and [OK]

How to create a “Happy Hour” promotion using Promotion Qty and Price?

Within the Promotion Qty and Price screen, it is possible to create a promotion to only run during specific times on a specific day of the week.

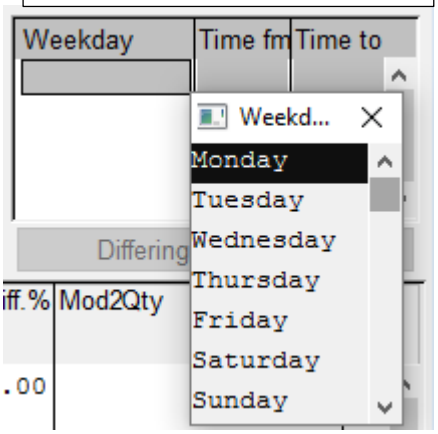
This enables the idea of a “happy hour” offer or a VIP night to run between certain times automatically to help drive up footfall and in turn sales.

These time periods are set up in the Weekday/Time Frm/Time To area of the screen.



1. Select the day(s) of the week that you would like the offer to run.

2. Enter the time(s) that you would like the offer to run between in a 24 hour clock format.

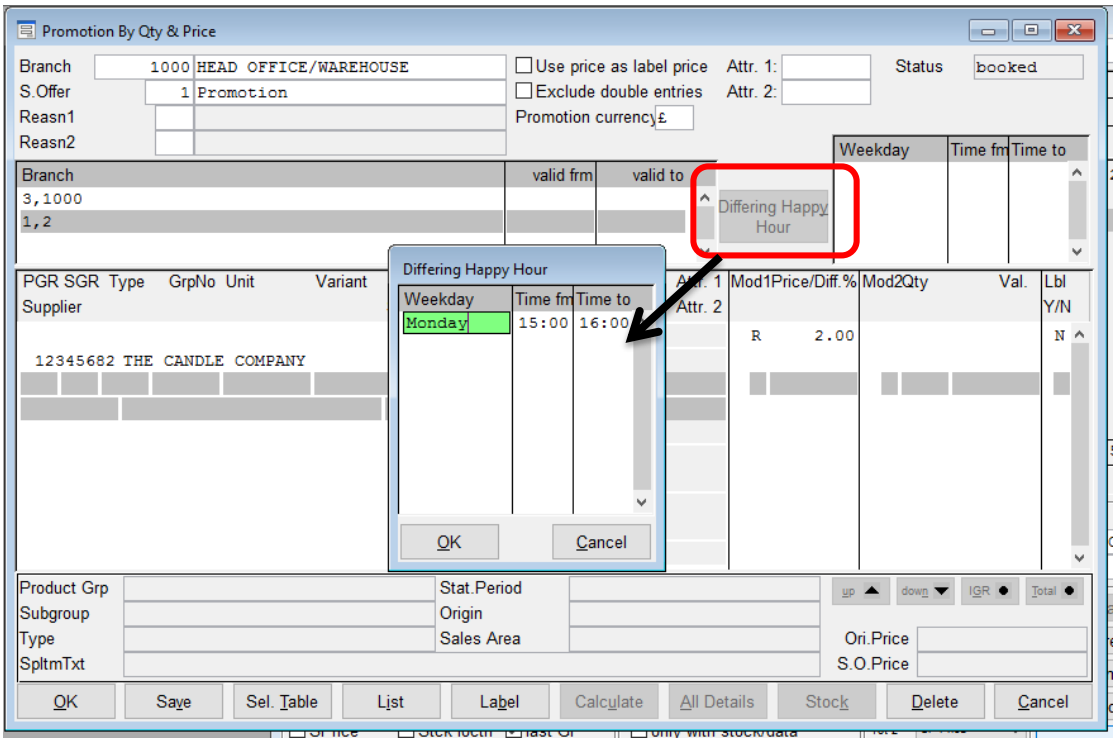


What if I want the offer to start at different times or on different days within the store?

It is possible to set a “happy hour” style offer, to start at different times or on different days for the different stores. You have two ways that you can do this;

a) Create a new offer record for each

b) Set the branches up on different lines in the branch filter area and use the ’Differing Happy Hour’ option on each individual line. This will bring up a window where the weekday and times can be added.



How to import items into the Promotion Qty and Price for a blanket promotion/discount (all items the same price)?

1. Create a spreadsheet in excel using either the Futura Reference Number or an items EAN. (Which one you use is dependant on which is set as your default code. If you have to add an 'R' before the Futura Reference Number, then you will need to use the EAN code.)

Example Ref. Number

	A	B	C
1	10283		
2	10290		
3	10276		
4	10252		
5			

Example EAN

	A	B	C
1	5000001256246		
2	5000012645644		
3	5000012347451		
4	5000005134745		
5			

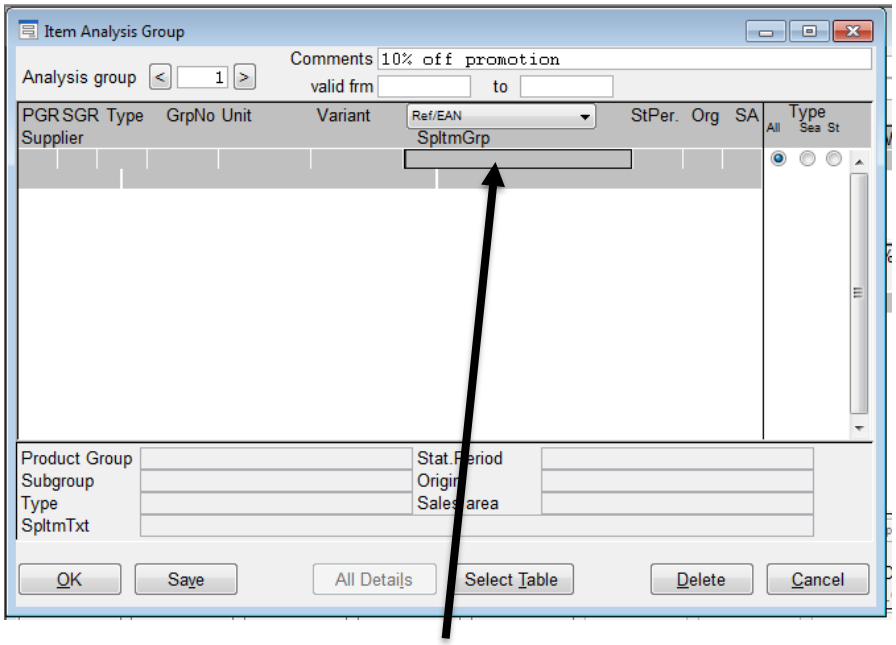
- This spreadsheet must not have any headers
- It can be created from an export that has been edited down
- It is recommended to do a delete on the blank cells around your data just to make sure Excel does not add any additional information such as blank record cells.

2. Save as CSV (comma delimited) file in an easy to locate destination folder (e.g. C:\ drive)

3. Open the Item Analysis Group screen, which is usually located;

PARAMETERS > OTHER PARAMETERS > ITEM ANALYSIS GROUPS

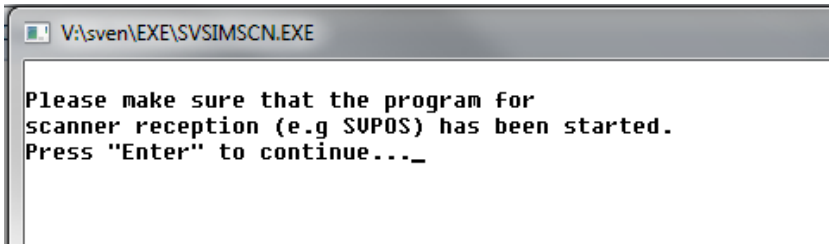
4. Enter an unused number in the 'Analysis Group' field and a comment as to what this group is.



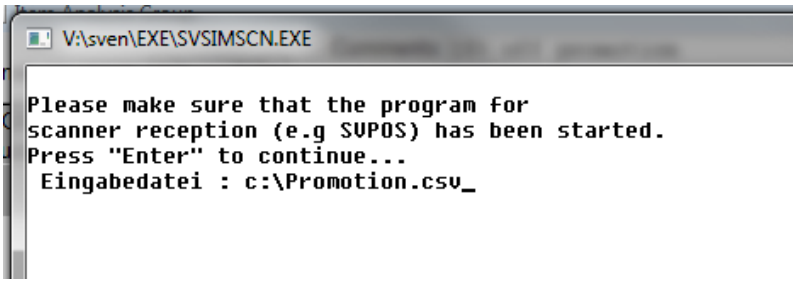
5. Place the cursor in the REF/EAN field in the table

6. Open the SVSIMSCN.EXE program.
   - This may be a shortcut on your desktop.
   - Or is located in the EXE folder usually on your Futura Server

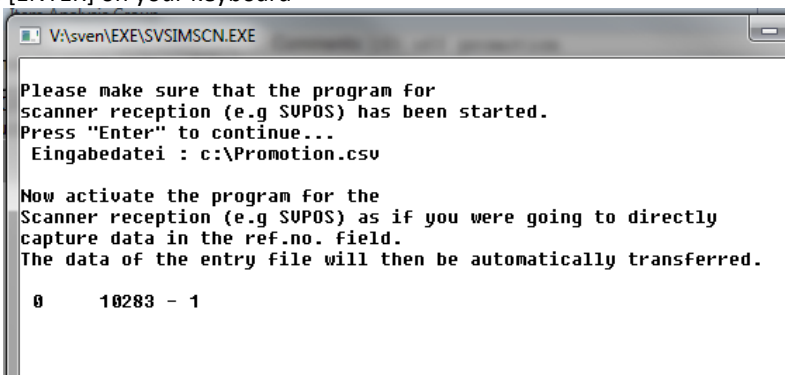
7. Press [ENTER] on your keyboard



8. Enter the location and the name of your spreadsheet (including the csv).

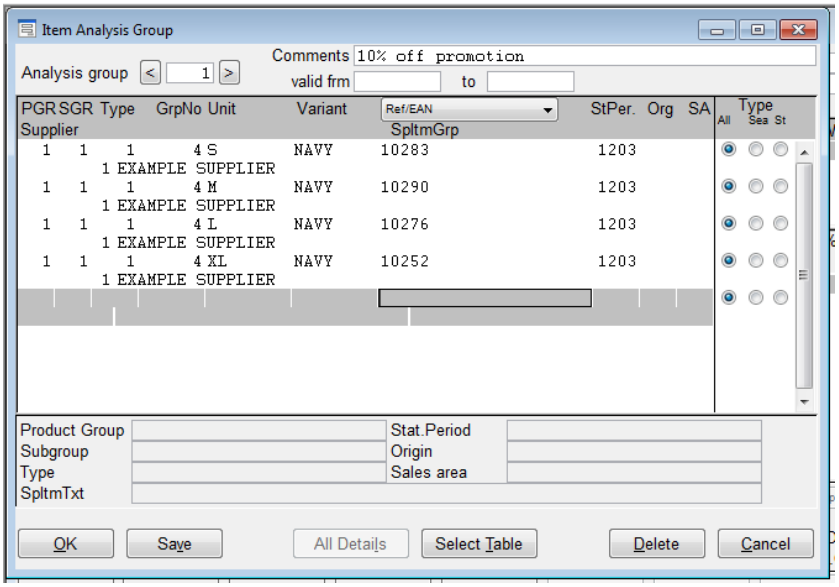


9. Press [ENTER] on your keyboard



10. Click back to the Futura Navigator, and the system will automatically import the information from your spreadsheet

This can take a few minutes depending on the size of your spreadsheet. You will see flicking on the screen and the SVSIMSCN.EXE programme will be updating with the information it is importing into Futura.



Important note if importing EAN's:
If you were importing items from the spreadsheet using the EAN number, then any items that did not contain an EAN number will need to be entered manually with the Futura reference number to the bottom of the screen table.

11. Press [OK] and close the Item Analysis Group screen down.
    - This can take a few minutes depending on the number of items in the list.

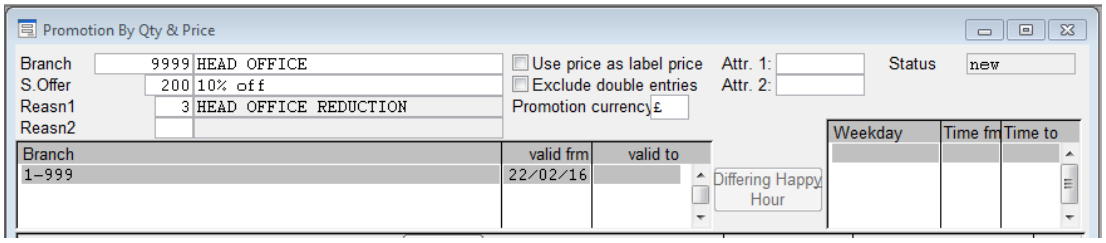
System messages that may appear:

There are scenarios, results and solutions at the end of this document which show examples of user errors that may arise when using the program.

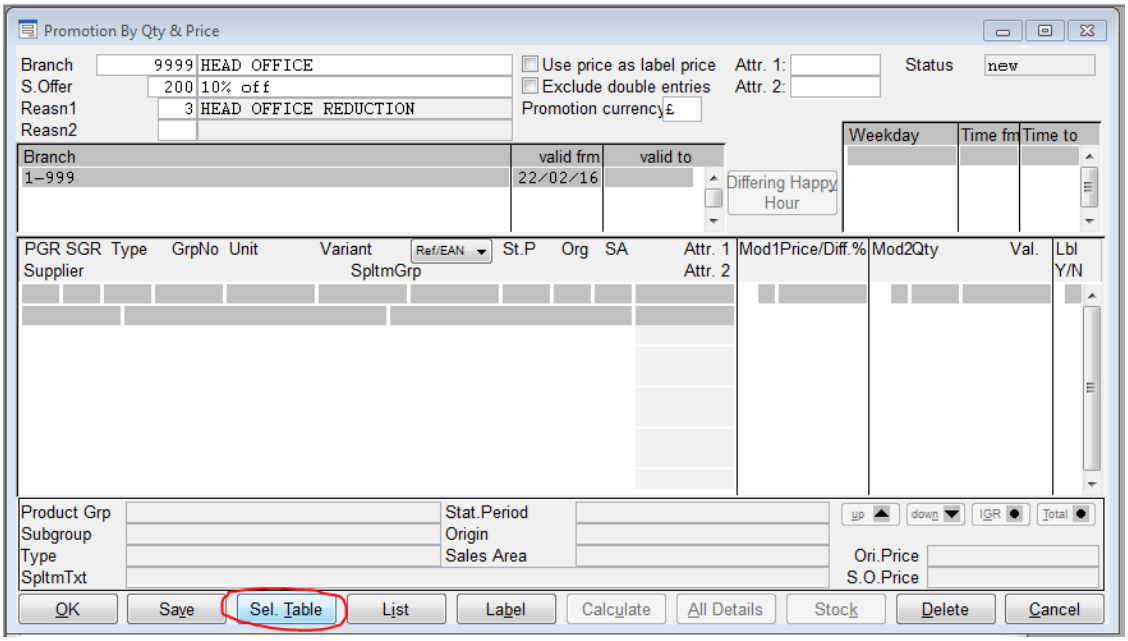
12. Open the Promotion By Qty and Price screen, which is usually located;

PRODUCT MANAGEMENT > CHANGE BRANCH PRICE > PROMOTION BY QTY & PRICE

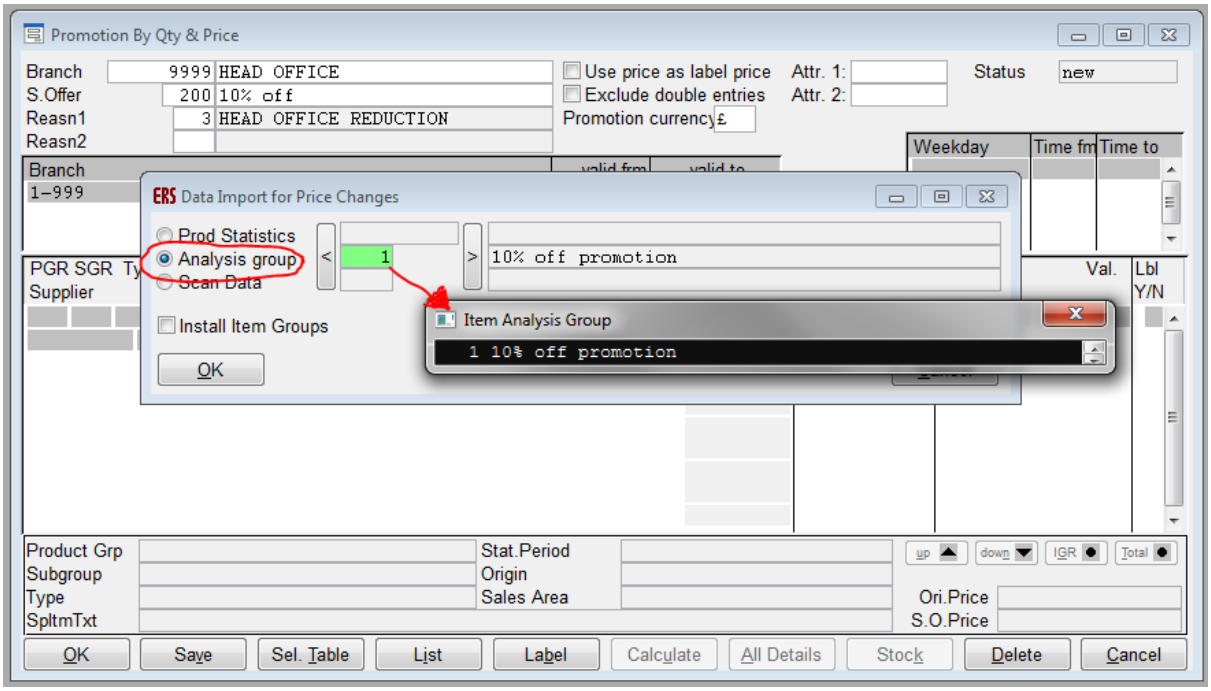
13. Create the header information as usual into the screen



14. Press [SELECT TABLE] at the bottom of the screen

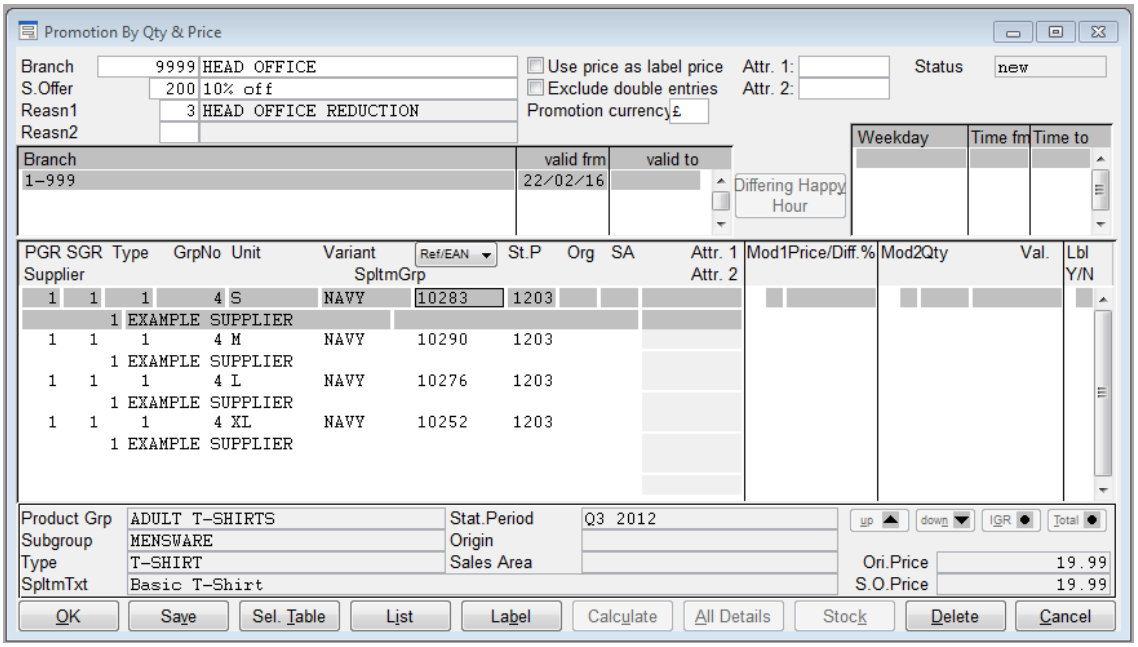


15. A window entitled ‘Data Import for Price Changes’ will appear
    - Select the ‘Analysis Group’ radio button
    - Enter your Analysis Group number or select it from the menu list.

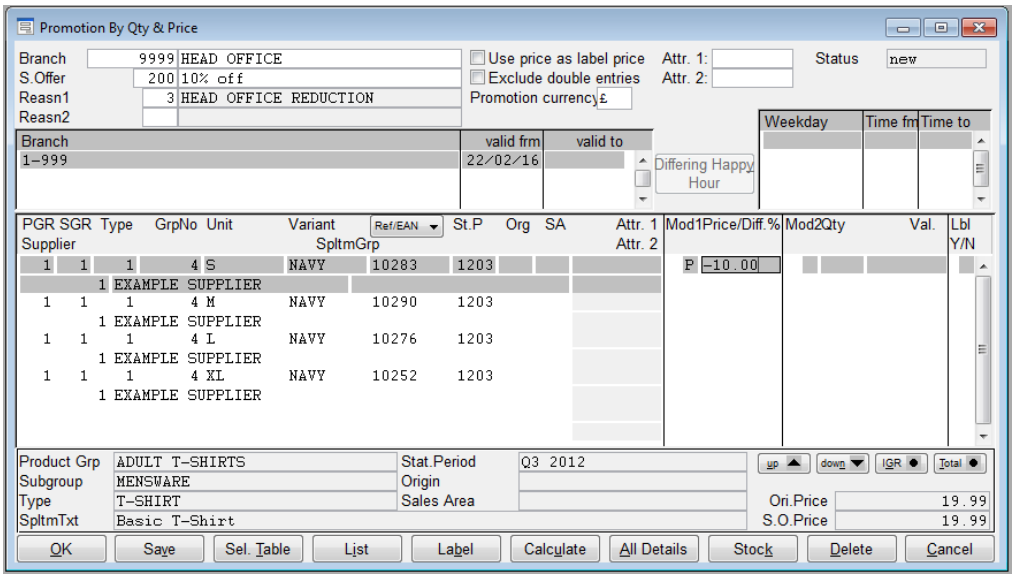


16. Press [OK]

17. This will import the items from the Item Analysis Group table at item level.
    - This can take a few minutes depending on the number of items in the list.

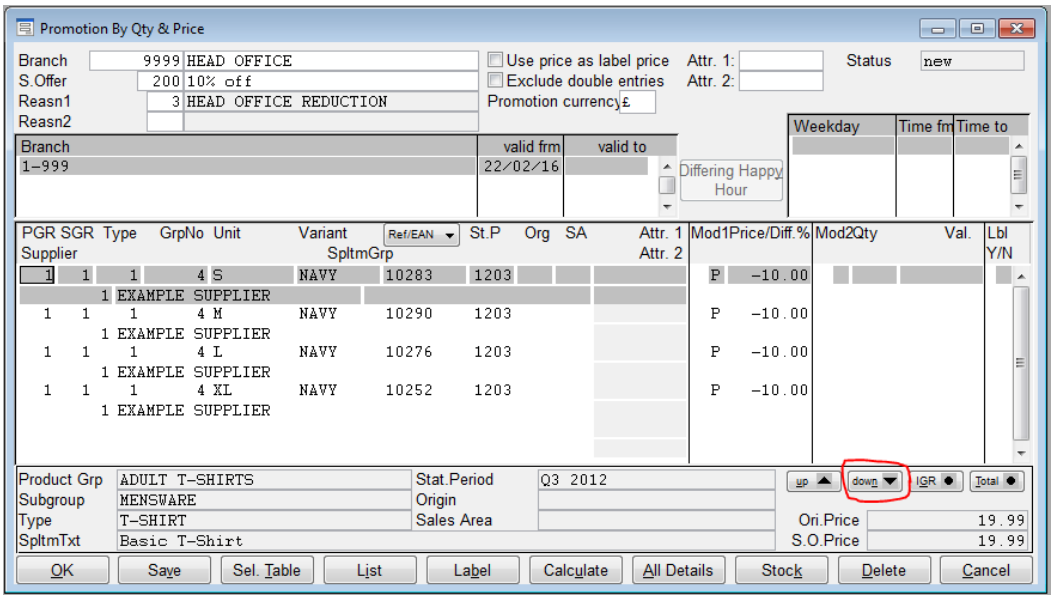


18. In the MODE 1 columns, enter the promotion type letter
    P = Percentage
    F = Fixed Price
    M = Mark Down



19. Enter the blanket value that the items will be discounted by.
(The example above is a 10% off offer)

20. Press the [DOWN ▼] button to copy the discount down to all items in the spreadsheet.
    - This can take a few minutes depending on the number of items in the list.



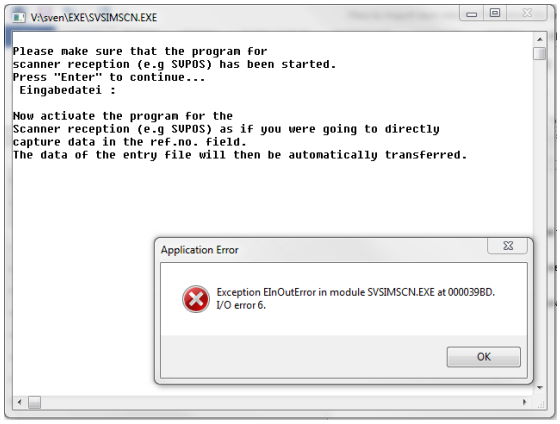
21. Press [SAVE] to save the offer.
    - This can take a few minutes depending on the number of items in the list.

Errors or messages that you may encounter

Scenario 1

- Pressing enter twice in the SVSIMSCN.EXE program without adding a mapping

Result:

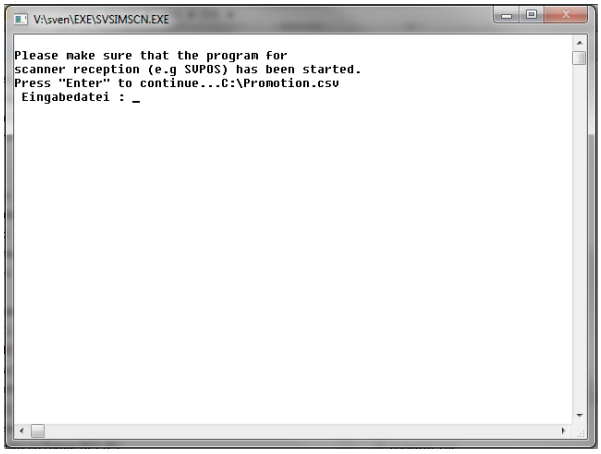


Solution: Press [OK], close the program using the [X] and reopen to start again

Scenario 2

- Entering the mapping without pressing [ENTER] first

Result:



Solution: Retype the mapping again and continue normal process

Scenario 3

- Entering the mapping incorrectly.

- Wrong drive
- Missing drive
- Missing file type .csv at the end
- Misspelt spreadsheet name

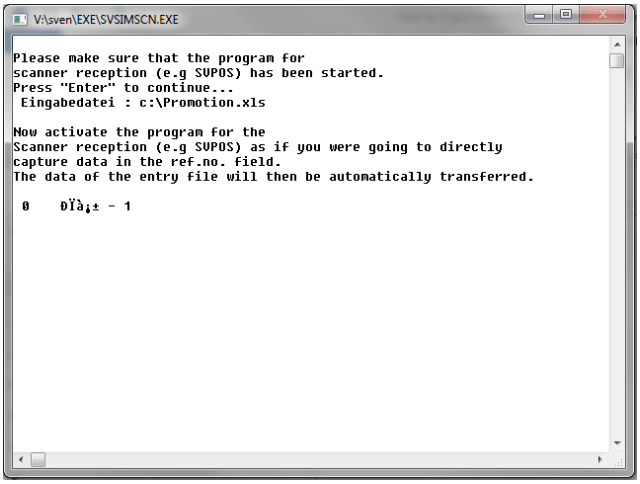
Result: The program will automatically close

Solution: Reopen the program and start again.

Scenario 4

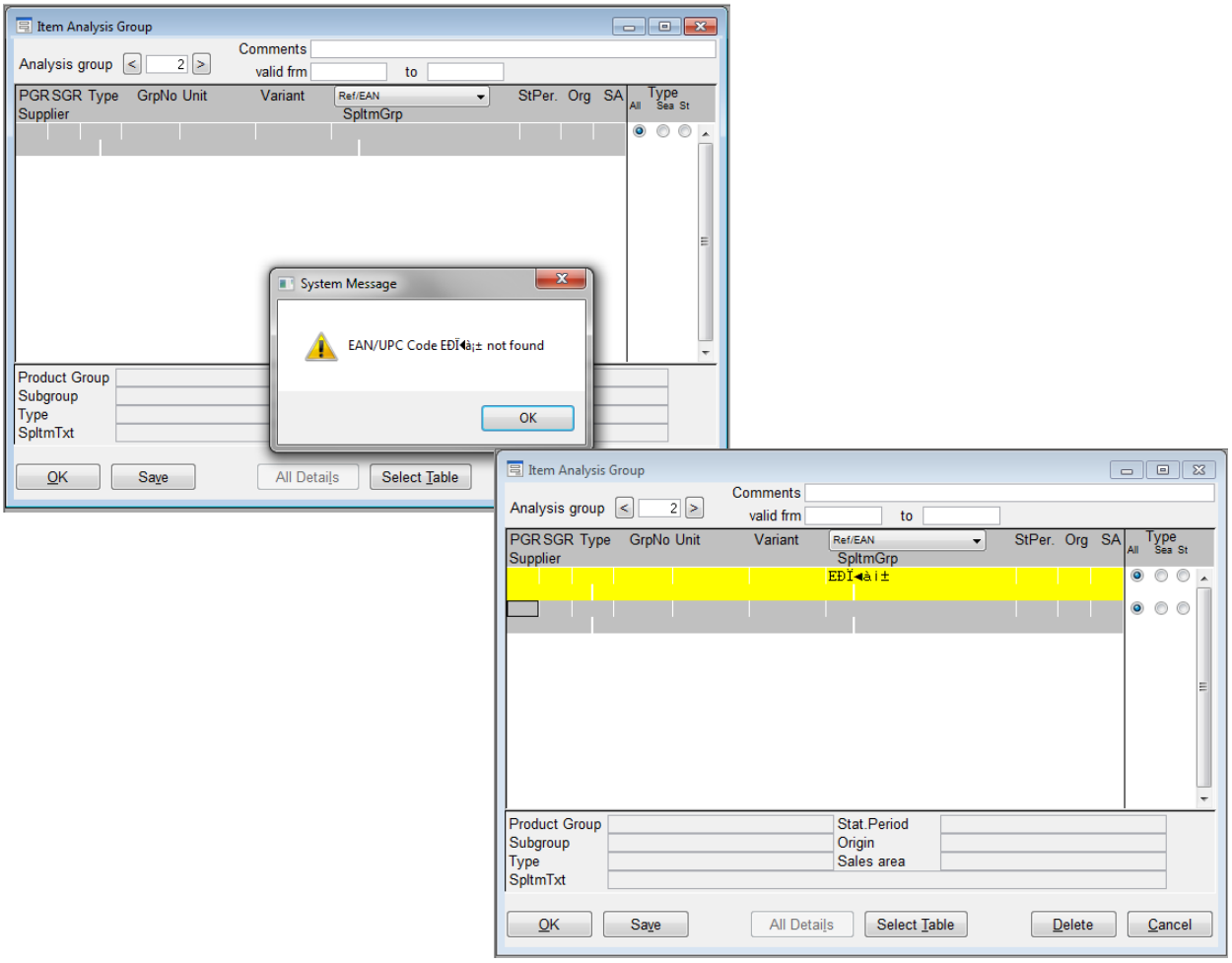
- Spreadsheet saved in the incorrect file type

Result:



Solution: Close the program using the [X] and reopen to start again.

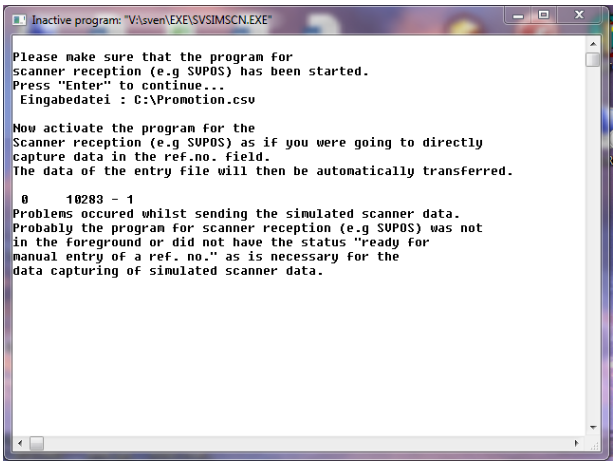
If you continued you would end up with the following which you would have to delete in Futura;



Scenario 5

- Leaving the SVSIMSCN.EXE program inactive for too long

Result:



Solution: Close the program using the [X] and reopen to start again

Checking which items are on a specific Promotion Quantity and Price offer.

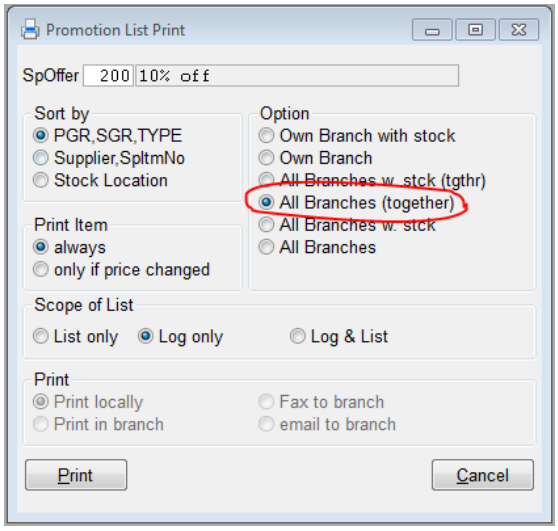
If you would like to check the items on the offer, then open the Promotion List Print screen, which is usually located;

1. Open the PROMOTION LIST PRINT module

2. Enter the Special Offer number that you assigned in the 'SpOffer' field

Radio buttons to select;

- Sort By = any
- Option = All Branches (together)
- Print Item = any ('Always' = show all. 'Only if price changed' = only if it resulted in a price change)
- Scope of List = any. Examples below



Example: LIST ONLY

Branch Price List

Branch Price List

Page : 1
16/02/16 11:00

Sorted by : Pgr,Sgr,Type
Range : All branches (tgthr)

Item Print : Always
Range of List: List only

Reason1: 3 HEAD OFFICE REDUCTION
Reason2:

Branch(es)	frm	to
1-999	22/02/2016	

Promotion list: (The "original price" is based on the entries in the price code 0 [])

RefNo	PGR	SGR	Typ	Number	Unit	Variant	Supplier	SpItmGrp	SpItmNo	Description	Loc	Site	Shelf	Stock	Orig Price	Curr Brnch Price	New Branch Price
10276	1	1	1	4	L	NAVY	1 EXAMPLE SUPPLIER		2080616	Basic T-Shirt					19.99		17.99
10290	1	1	1	4	M	NAVY	1 EXAMPLE SUPPLIER		2080616	Basic T-Shirt					19.99		17.99
10283	1	1	1	4	S	NAVY	1 EXAMPLE SUPPLIER		2080616	Basic T-Shirt					19.99		17.99
10252	1	1	1	4	XL	NAVY	1 EXAMPLE SUPPLIER		2080616	Basic T-Shirt					19.99		17.99

Example: LOG ONLY

Branch Price List

Branch Price List

Page : 1
16/02/16 11:00

Sorted by : Pgr,Sgr,Type
Range : All branches (tgthr)

Item Print : Always
Range of List: Log only

Reason1: 3 HEAD OFFICE REDUCTION
Reason2:

Branch(es)	frm	to
1-999	22/02/2016	

Log:

PGR	SGR	Typ	Number	Unit	Variant	Ref. No.	Supplier	SpItmGrp	SpItmNo	StatP.	Org	SA	Mod1	Price/Diff.%	Mod2	Qty	Value
1	1	1	4	S	NAVY	10283	1 EXAMPLE SUPPLIER		2080616	1203			P	-10.00			
1	1	1	4	M	NAVY	10290	1 EXAMPLE SUPPLIER		2080616	1203			P	-10.00			
1	1	1	4	L	NAVY	10276	1 EXAMPLE SUPPLIER		2080616	1203			P	-10.00			
1	1	1	4	XL	NAVY	10252	1 EXAMPLE SUPPLIER		2080616	1203			P	-10.00			

Example: LOG & LIST

Branch Price List

Branch Price List

Page : 1
16/02/16 11:08

Sorted by : Pgr,Sgr,Type
Range : All branches (tgthr)

Item Print : Always
Range of List: Log & List

Reason1: 3 HEAD OFFICE REDUCTION
Reason2:

Branch(es)	frm	to
1-999	22/02/2016	

Log:

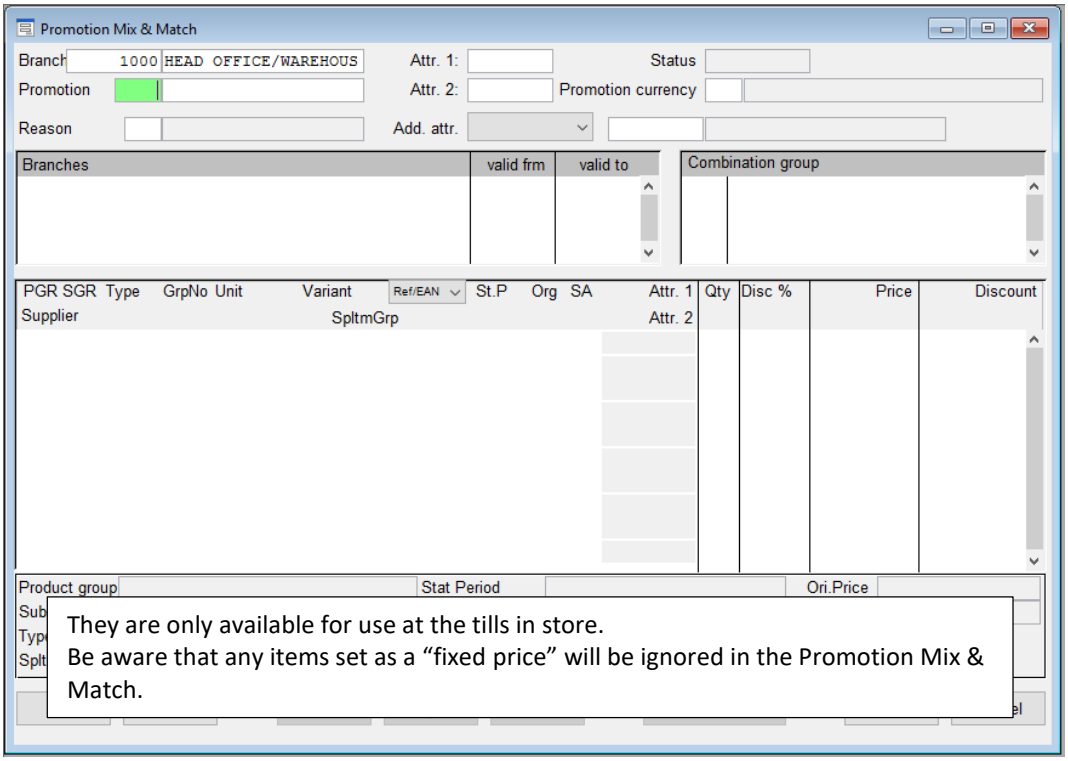
PGR	SGR	Typ	Number	Unit	Variant	Ref. No.	Supplier	SpItmGrp	SpItmNo	StatP.	Org	SA	Mod1	Price/Diff.%	Mod2	Qty	Value
1	1	1	4	S	NAVY	10283	1 EXAMPLE SUPPLIER		2080616	1203			P	-10.00			
1	1	1	4	M	NAVY	10290	1 EXAMPLE SUPPLIER		2080616	1203			P	-10.00			
1	1	1	4	L	NAVY	10276	1 EXAMPLE SUPPLIER		2080616	1203			P	-10.00			
1	1	1	4	XL	NAVY	10252	1 EXAMPLE SUPPLIER		2080616	1203			P	-10.00			

Promotion list: (The "original price" is based on the entries in the price code 0 [])

RefNo	PGR	SGR	Typ	Number	Unit	Variant	Supplier	SpItmGrp	SpItmNo	Description	Loc	Site	Shelf	Stock	Orig Price	Curr Brnch Price	New Branch Price
10276	1	1	1	4	L	NAVY	1 EXAMPLE SUPPLIER		2080616	Basic T-Shirt					19.99		17.99
10290	1	1	1	4	M	NAVY	1 EXAMPLE SUPPLIER		2080616	Basic T-Shirt					19.99		17.99
10283	1	1	1	4	S	NAVY	1 EXAMPLE SUPPLIER		2080616	Basic T-Shirt					19.99		17.99
10252	1	1	1	4	XL	NAVY	1 EXAMPLE SUPPLIER		2080616	Basic T-Shirt					19.99		17.99

Promotion Mix and Match

The "Promotion Mix & Match" function is used to create definitions for granting discounts when specific combinations of items are sold in one transaction.



Item attribute filters and the Ref number button

From version 3.26B, it is now possible to filter items in promotion by item attributes.
If you have upgraded and the items attributes are not visible, then a configuration setting has not been changed. Please log a call with the Futura Support Team to request this configuration to be changed.

Once the configuration has been altered, an additional button will become available entitled [REF NUMBERS F4]. This enables you to enter a list of reference numbers that should be valid for that line.

What categories are available to enter into the Item Selection?

The categories that are available to be used as item selection criteria are;

- Product Group
- Sub Group
- Type
- Group Number
- Unit
- Variant
- Reference Number (Futura SKU)
- Origin
- Sales Area
- Supplier
- Supplier Item Group
- Supplier Item Number
- Statistical Period
- Item Attributes (with number value options. If activated)

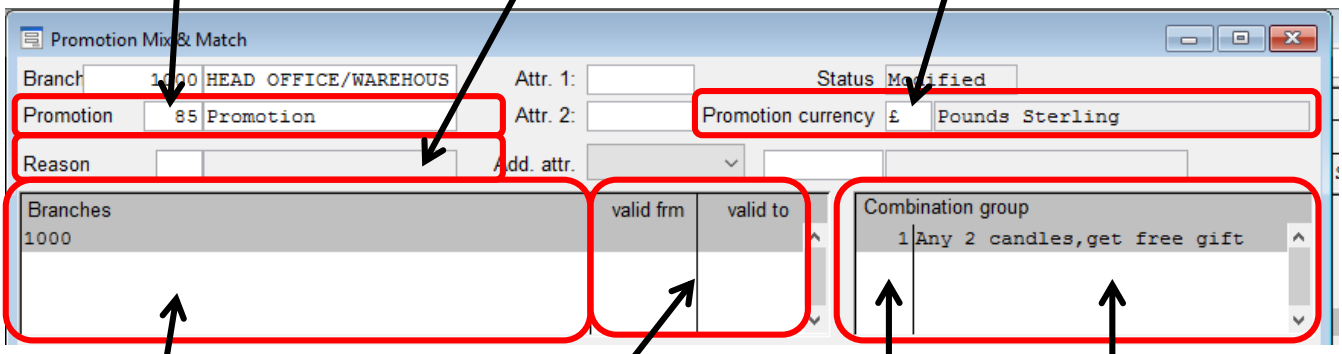
NOTE: It is recommended to keep one of these fields (usually Origin or Sales Area) free to be used to group items together for promotions.
This is especially useful for Promotion Mix and Match where combinations of product can be sold together and can help avoid the need of setting up each combination manually. Instead one combination can be set up as the screenshot below demonstrates. So any combination of items that have a Sales Area 3 can be brought for this promotion to work.

Step by Step: How to create the Header information for Promotion Mix and match offers?

How to populate the Header information

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

1. Open the Promotion Mix & Match screen.
2. Find out the next blank special order number. (this can be done by entering '1 ' and using the search function. Choose a number that is not visible in the menu up to 999999 characters and press ESC to exit the menu)



3 Enter the special order number and press Enter

4 Add your offer description and press Enter.

5 Add Reason code to be recorded against transactions.

(You can use the search function to bring up a list of current reasons)

6 From 3.26B, enter the branch currency restriction.

7 Enter your branch range(s) that you would like this offer to be valid in and press Enter.

8 Enter the valid from and to dates and press Enter (if either the from date is blank, the offer will be after from the next polling. If the to date is blank, this offer will remain active until it is deleted or this field is populated.

10 Enter the Combination number.

One Special Offer number can hold different combinations. Each combination number is a separate promotion.

11 Add a description so you know what items this combination group refers to. This is important if you have multiple set up in the same offer number.

Step by Step: How to create a percentage offer?

Examples - Buy one get one free - Buy 2 get a free gift

- 3 for 2 - Buy 1 get 1 half price

a) Buy any two candles and get a free gift

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

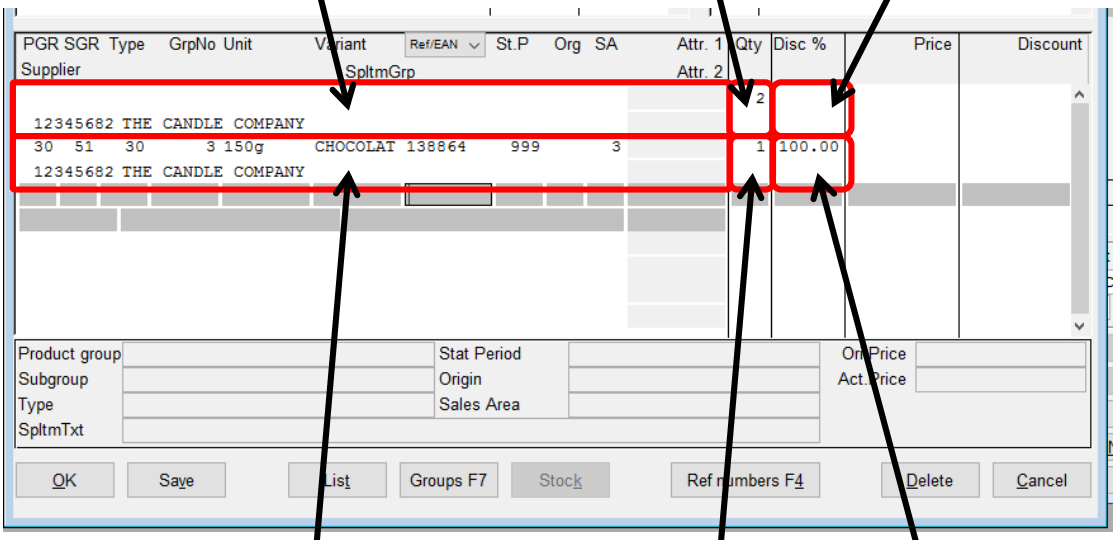
1 Follow steps in the 'Header Information section to populate the offer and the continue with below.

2 In the first row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

3 Enter the quantity of items with these criteria that the customer MUST purchase for this offer on that row.

Example: this customer must purchase 2 items from Supplier 12345682

4 Leave this field blank. It means that these items are full price.



5 In the second row, enter the reference number of the product that should be given away free.

6 Enter the quantity of item with these criteria that the customer MUST purchase for this offer on that row.

7 Enter 100 in the 'Disc. % field'. It means that this item will be reduced 100 % (i.e. is free)

8 Press [SAVE] and [OK]

b) Buy any one candle and get one half price

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

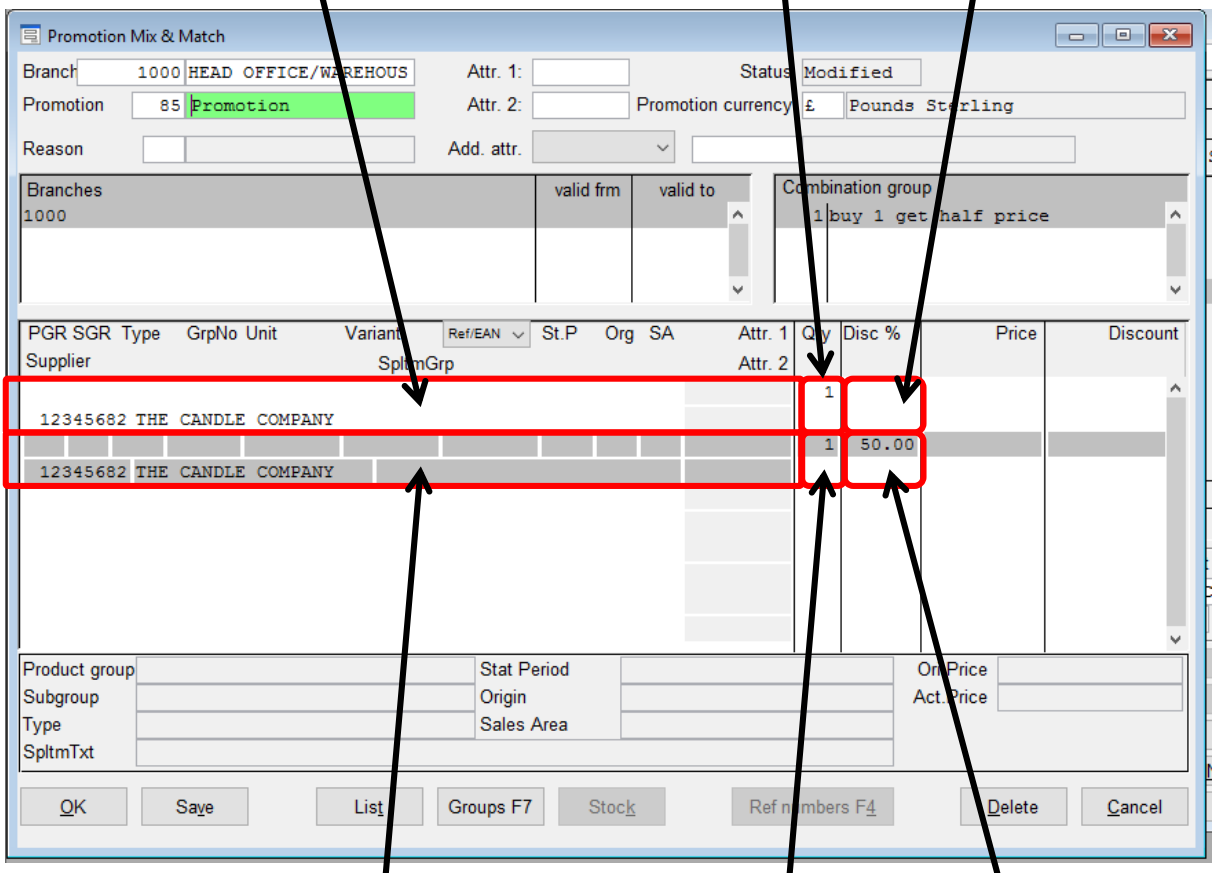
1 Follow steps in the 'Header Information section to populate the offer and the continue with below.

2 In the first row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

3 Enter the quantity of items with these criteria that the customer MUST purchase for this offer on that row.

Example: this customer must purchase 1 items from Supplier 12345682

4 Leave this field blank. It means that these items are full price.



5 In the second row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

6 Enter the quantity of item with these criteria that the customer MUST purchase for this offer on that row.

7 Enter 50 in the 'Disc. % field'. It means that this item will be reduced 50 % (i.e. is half price)

8 Press [SAVE] and [OK]

c) Buy any one candle and get one free

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

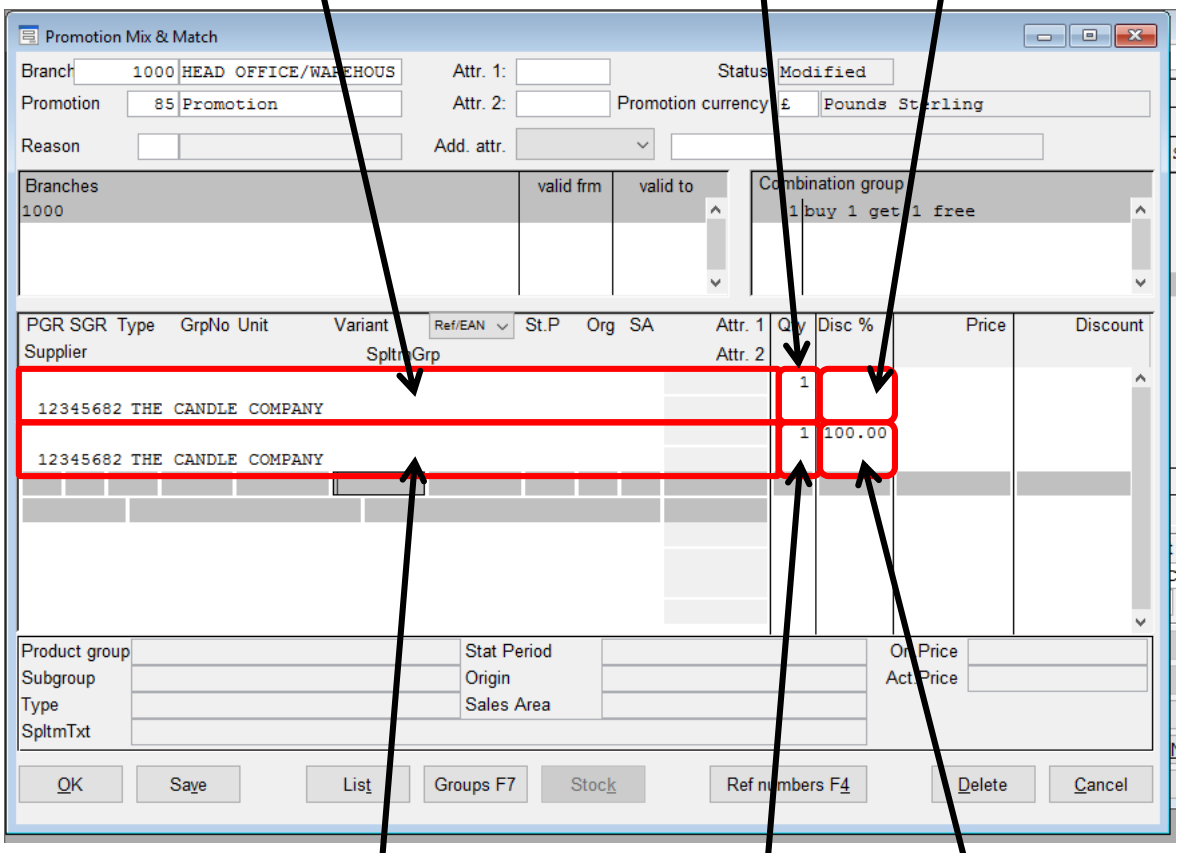
1 Follow steps in the 'Header Information section to populate the offer and the continue with below.

2 In the first row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

3 Enter the quantity of items with these criteria that the customer MUST purchase for this offer on that row.

Example: this customer must purchase 2 items from Supplier 12345682

4 Leave this field blank. It means that these items are full price.



5 In the second row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

6 Enter the quantity of item with these criteria that the customer MUST purchase for this offer on that row.

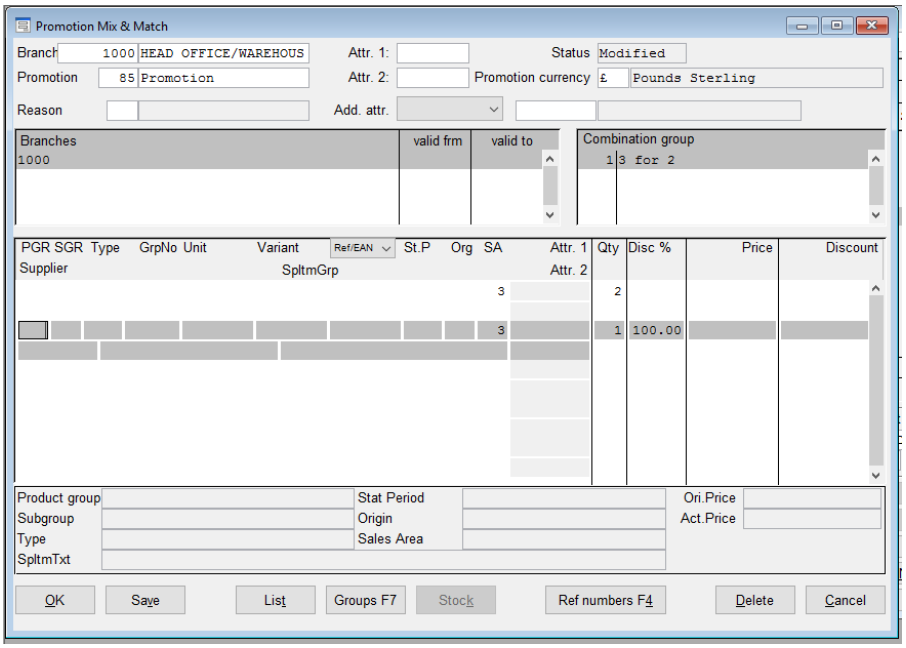
7 Enter 100 in the 'Disc. % field'. It means that this item will be reduced 100 % (i.e. is free)

8 Press [SAVE] and [OK]

3 for 2 promotions

The easiest way to set up and link items in to this offer is to use the Sales Area (or another unused field) as an offer identifier.
So, by creating a new Sales Area (e.g. 3 for 2), you can then attach this to the items that you would like included on this offer, providing an easy way to link items across different PGR's. These items can easily have this field updated using Futura4Data: Item Update. All you would need is 3 columns; 1 for the item reference number, one with the new Sales Area number and one for the item 'Status' which should be set to 2

Important Note: do not select' Detail Status' for the column heading; the correct heading name is 'Status' for this column



Once the above is in place, you will only need to set up one promotion record with at least 1 combination group, like the example below;

When this offer is now placed through a till, the discount will come off the items as follows;

1. With 2 items;

2. With the 3rd item added, the system will automatically take away the total amount of the cheapest item. In this case it was the first item scanned, which you can see the price has now disappeared from below.

3. I have adapted my test receipt to show that the discount has just been taken off the scented wax beads.

So as you can see above, the discount will be fully applied to the item cheapest item

You would not want to try and make the discount apply across the 3 items as you can see I have tried to do in the example receipt to the left. (I have taken 33% off the two of the items and 34% off another, equalling a total discount % of 100%)

33 + 33 + 34 = 2100

As you can see, the resulting discount applied is drastically higher because the discount percentages are taken off each items individual selling price.

- **What happens if a customer purchases one or more extra items valid for this offer?**

When Promotion Mix and Match is used with wide item selections (non-specific) like I have set up the offer above; the system does a calculation to give the customer the best result;

Example; I have 6 items at the following prices;

ITEM	PRICE
Item A	£10
Item B	£9
Item C	£25
Item D	£65
Item E	£80
Item F	£30

So when 3 items above are scanned in the following order;
Item A £10
Item B £9
Item C £25

The system then sort these internally by price, so is looking at this in the following order;
Item C £25
Item A £10
Item B £9 = cheapest is free

When another item is scanned e.g. **Item D £65**, the system then reshuffles the order to the following;
Item D £65
Item C £25
Item A £10 = this is now the free item
Item B £9

- **What happens if a customer purchases 6 items valid for the 3 for 2 offer?**

As soon as the 6 items above are all entered, regardless of the scanning order, the system is actually reading these as follows;
Item E £80
Item D £65
Item F £30 = Item Free
Item C £25
Item A £10
Item B £9 = Item Free

So the system calculates the discount to give the best price combination for the customer.

Step by Step: How to create a fixed price offer?

Examples - Buy two get the third for a fixed price

- *Buy two items and get a specific item for a fixed price of £10.00*
- Buy 3 for £15

a) Buy two and get the third item for a fixed price of £5.00

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

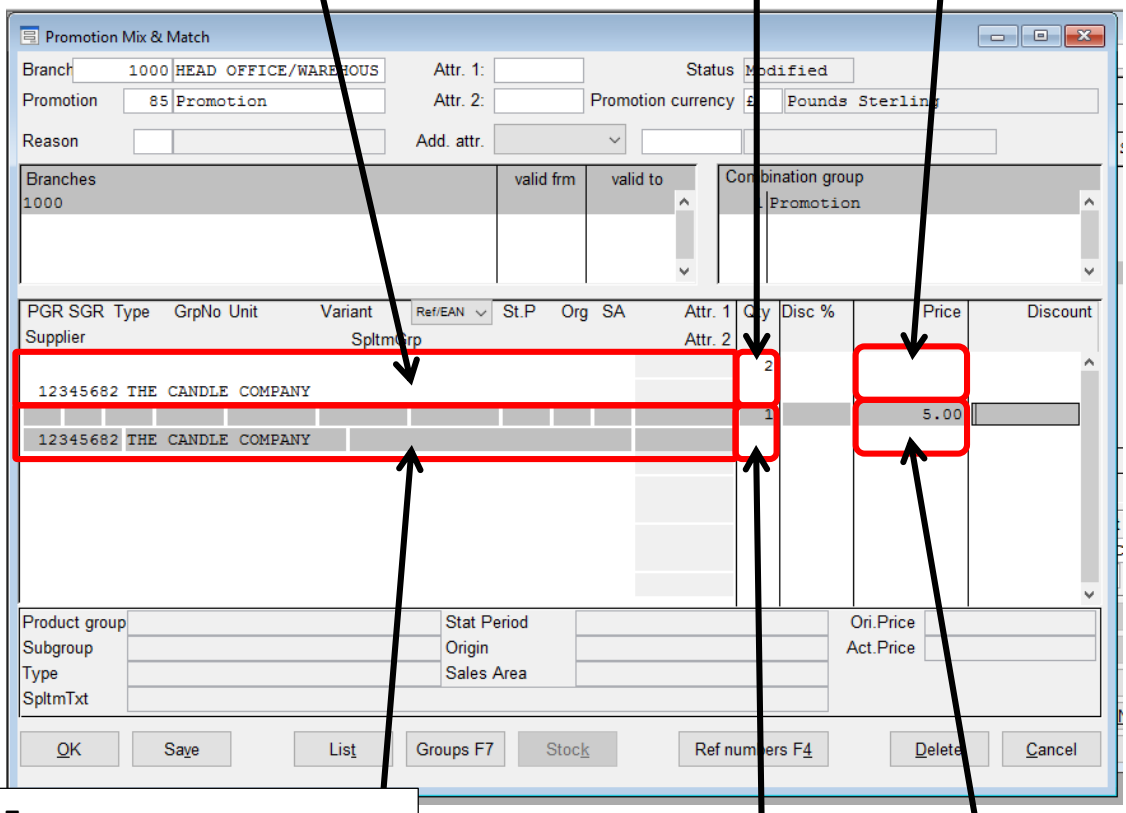
1 Follow steps in the 'Header Information section to populate the offer and the continue with below.

2 In the first row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

3 Enter the quantity of items with these criteria that the customer MUST purchase for this offer on that row.

Example: this customer must purchase 2 items from Supplier 12345682

4 Leave this field blank. It means that these items are full price.



5 In the second row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

6 Enter the quantity of item with these criteria that the customer MUST purchase for this offer on that row.

7 Enter 5.00 in the 'Price' field. It means that this item will be sold at £5.00.

8 Press [SAVE] and [OK]

b) Buy two and get a specific item for a fixed price of £10.00

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

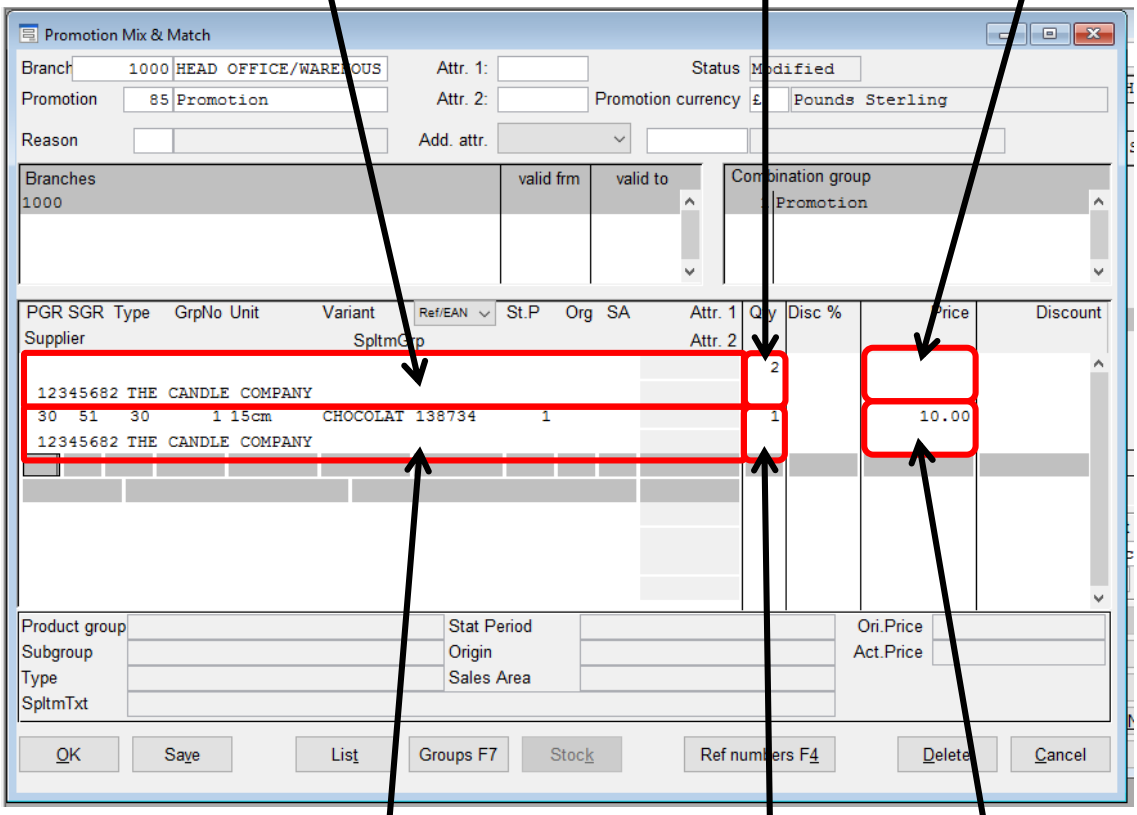
1 Follow steps in the 'Header Information section to populate the offer and the continue with below.

2 In the first row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

3 Enter the quantity of items with these criteria that the customer MUST purchase for this offer on that row.

Example: this customer must purchase 2 items from Supplier 12345682

4 Leave this field blank. It means that these items are full price.



5 In the second row, enter the reference number of the product that should be given away free.

6 Enter the quantity of item with these criteria that the customer MUST purchase for this offer on that row.

7 Enter 10.00 in the 'Price' field. It means that this item will be sold at £10.00.

8 Press [SAVE] and [OK]

c) Buy 3 for a fixed price of £15.00

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

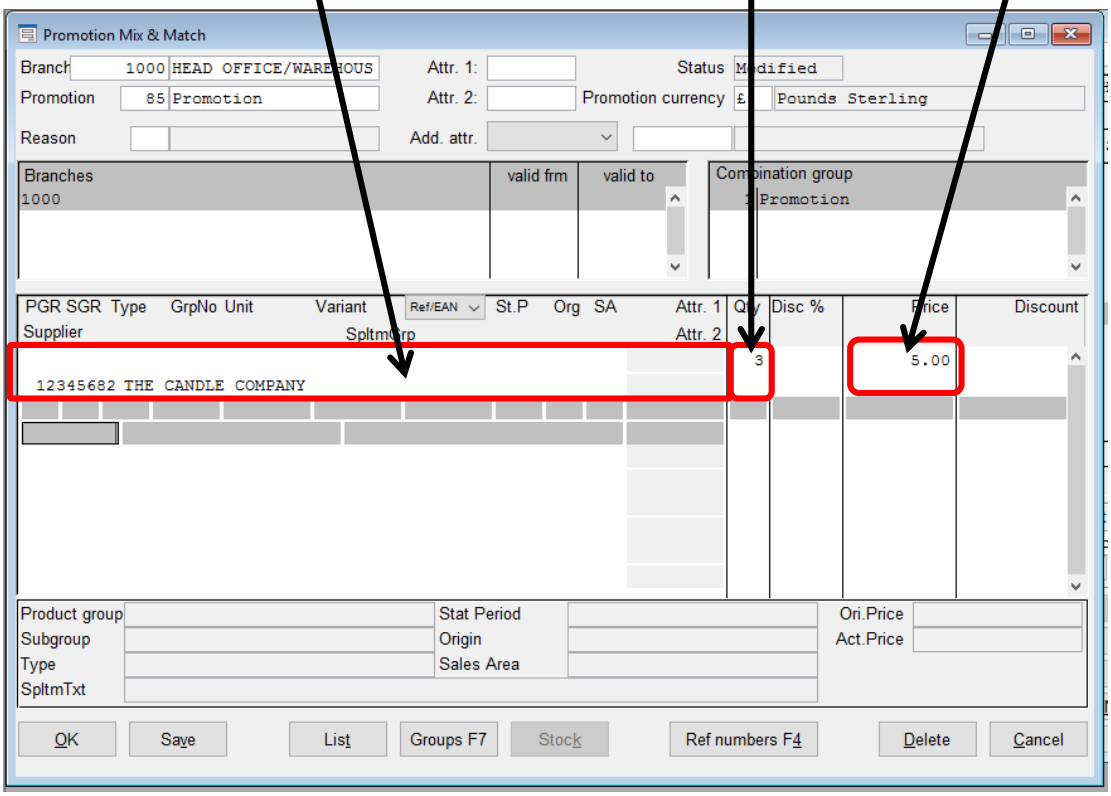
1 Follow steps in the 'Header Information section to populate the offer and the continue with below.

2 In the first row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

3 Enter the quantity of items with these criteria that the customer MUST purchase for this offer on that row.

Example: this customer must purchase 3 items from Supplier 12345682

4 Enter the value in the 'Price' column that EACH individual item should be sold at.



8 Press [SAVE] and [OK]

IMPORTANT NOTE FOR ENTERING THE PRICE: Times your price value by the quantity value entered to find out how much the transaction total will be.

3 x £5 = £15.00 → This is the correct about

3 x £15 = £45 → This would be the incorrect value.

Step by Step: How to create a money off offer?

Examples - Buy two and get £5.00 off the third

- Buy three items and get £10.00 off a specific item

a) Buy two and get £10 off the third item

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

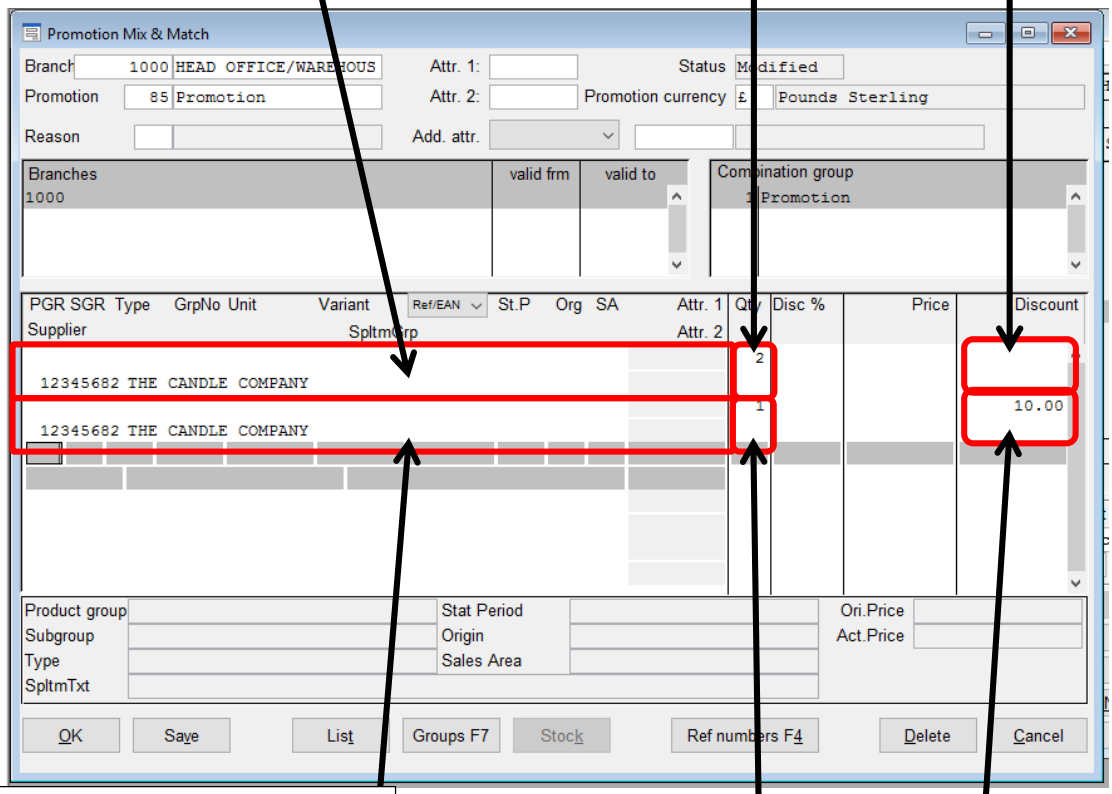
1 Follow steps in the 'Header Information section to populate the offer and the continue with below.

2 In the first row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

3 Enter the quantity of items with these criteria that the customer MUST purchase for this offer on that row.

Example: this customer must purchase 2 items from Supplier 12345682

4 Leave this field blank. It means that these items are full price.



5 In the second row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

6 Enter the quantity of item with these criteria that the customer MUST purchase for this offer on that row.

7 Enter 10.00 in the 'Discount' field. It means that this item will be reduced by £10.00.

8 Press [SAVE] and [OK]

b) Buy three items and get £5 off a specific fourth item

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

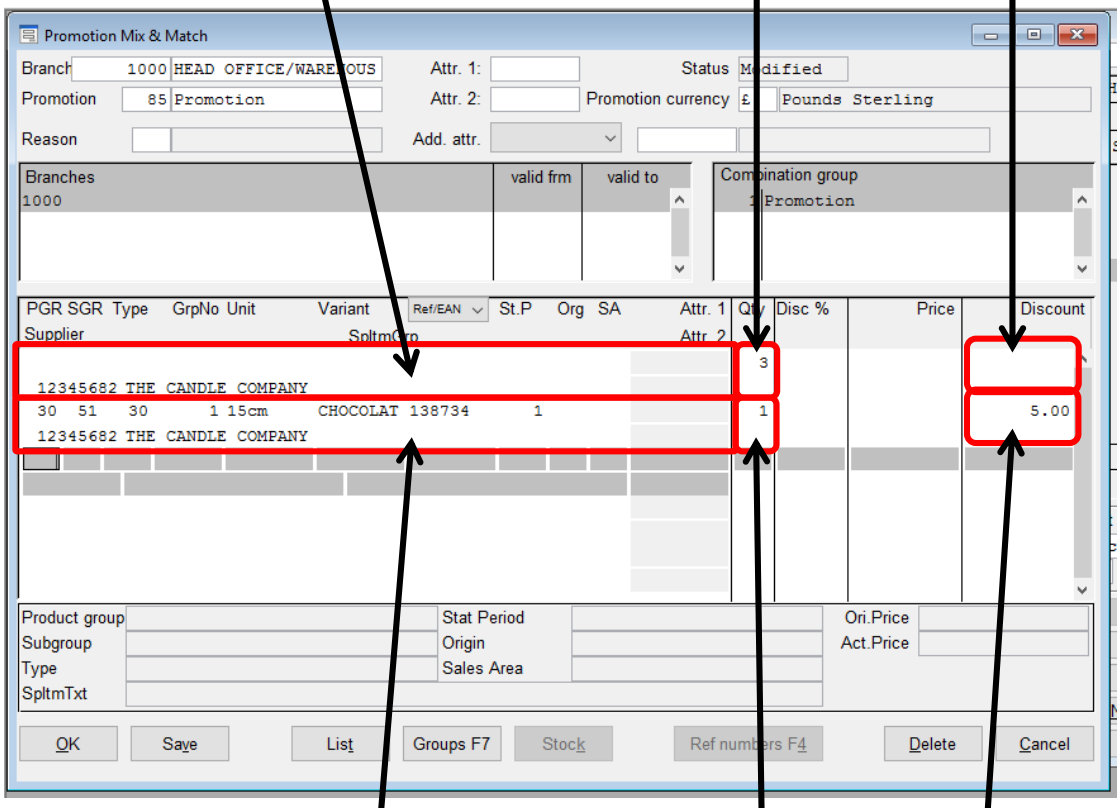
1 Follow steps in the 'Header Information section to populate the offer and the continue with below.

2 In the first row, enter any item filters that are required for this promotion. It you are using Attribute filters, remember to select them before have in the 'Attr' fields at the top of the window first.

3 Enter the quantity of items with these criteria that the customer MUST purchase for this offer on that row.

Example: this customer must purchase 3 items from Supplier 12345682

4 Leave this field blank. It means that these items are full price.



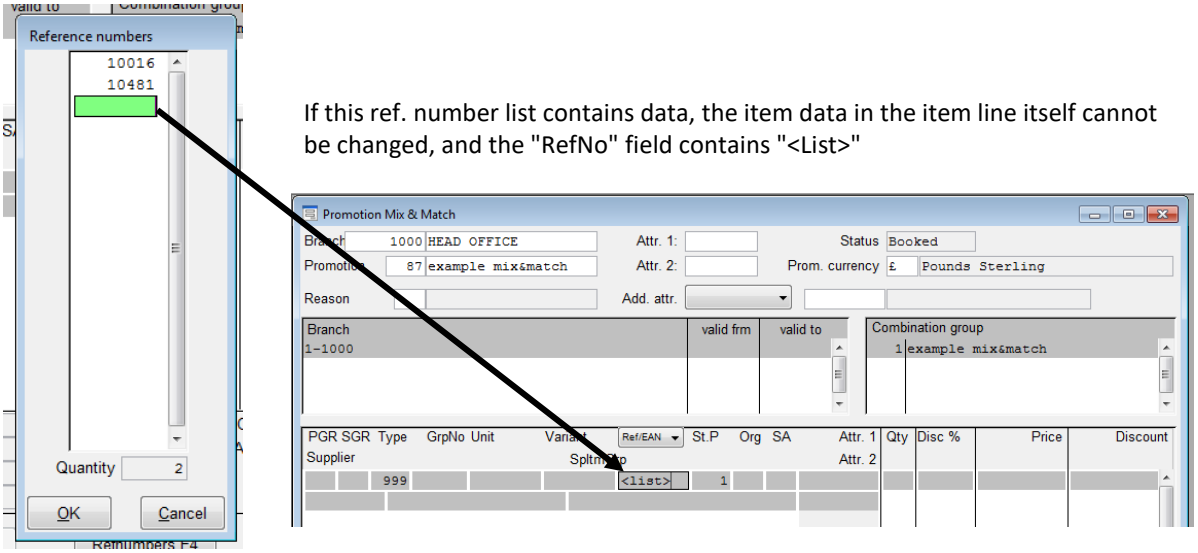
5 In the second row, enter the reference number of the product that should be given away free.

6 Enter the quantity of item with these criteria that the customer MUST purchase for this offer on that row.

7 Enter 5.00 in the 'Discount' field. It means that this item will be reduced by £5.00.

Promotion Mix & Match – Entering reference numbers in a list

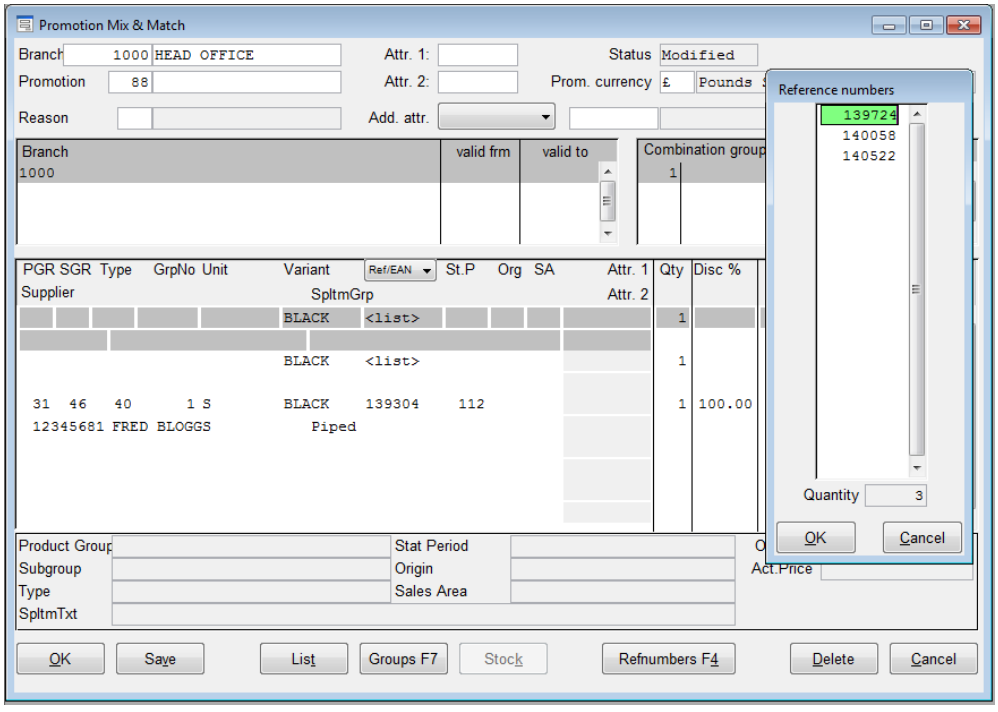
In addition to the existing entry variants, "Promotion Mix & Match" allows the "Ref numbers F4" button to be used to enter a list of reference numbers which are equally valid in the relevant line.



If the items in the list contain “identical” information, this information is pulled through and displayed. In the example above, Type has a value of 999, which both this SKU’s share.

Note: Item attributes cannot be used with these “<LIST>” type promotion. If you populate these fields, the system will automatically change the PGR/SGR/Type/ to 9999 values.

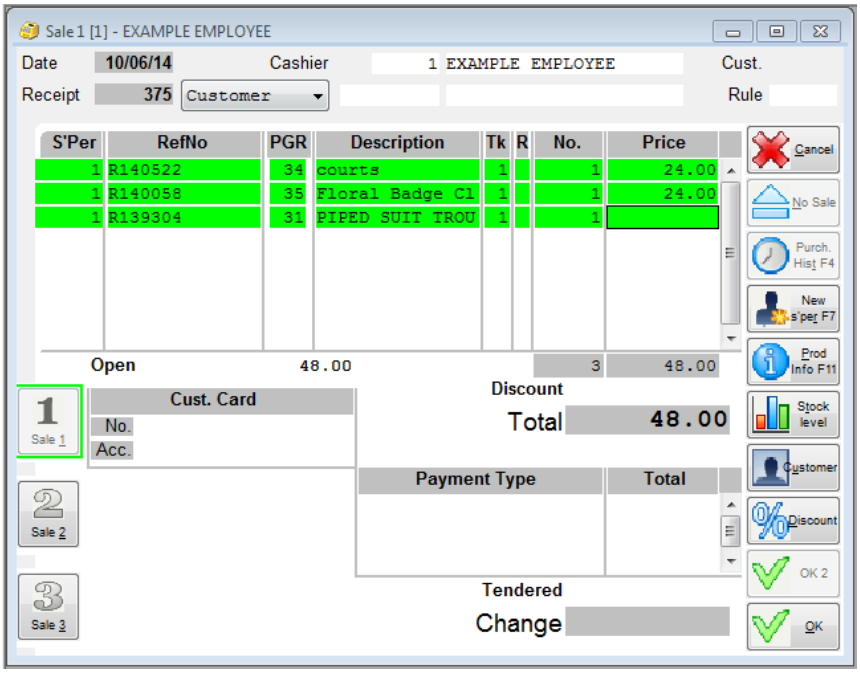
An example of this promotion is displayed below using a 3 for 2 offer;



In the example above, I have entered the same list of SKU’s in 2 rows using the Refnumber F4 button.

This is because is you only entered them in 1 field, then this promotion will only kick in is 2 of the same item are brought in the list. If 2 different items were brought, then both will remain at full price when the 3rd item is scanned.

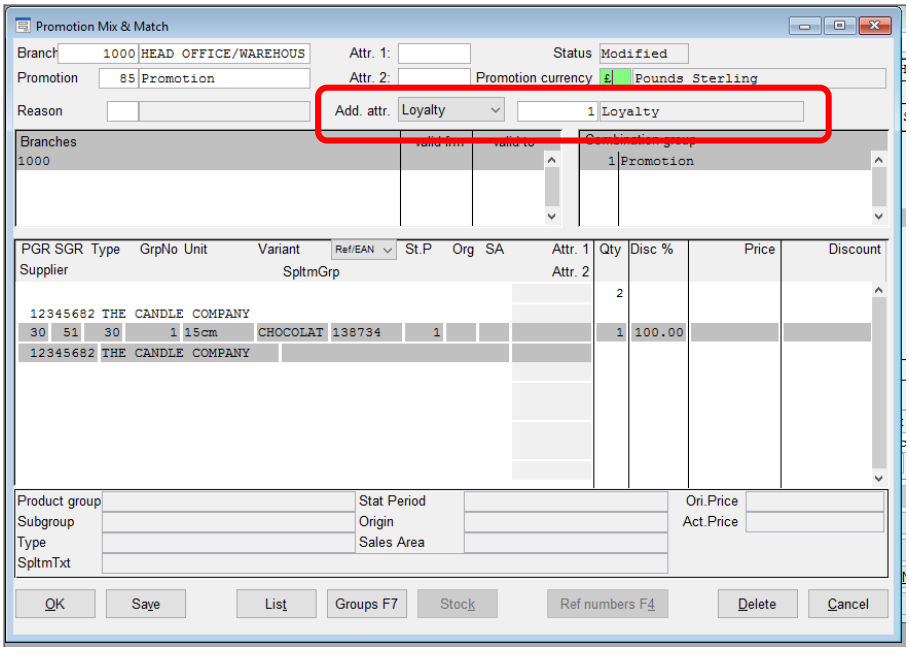
By entering the same information for the second line, the promotion will then be a true mix and match.



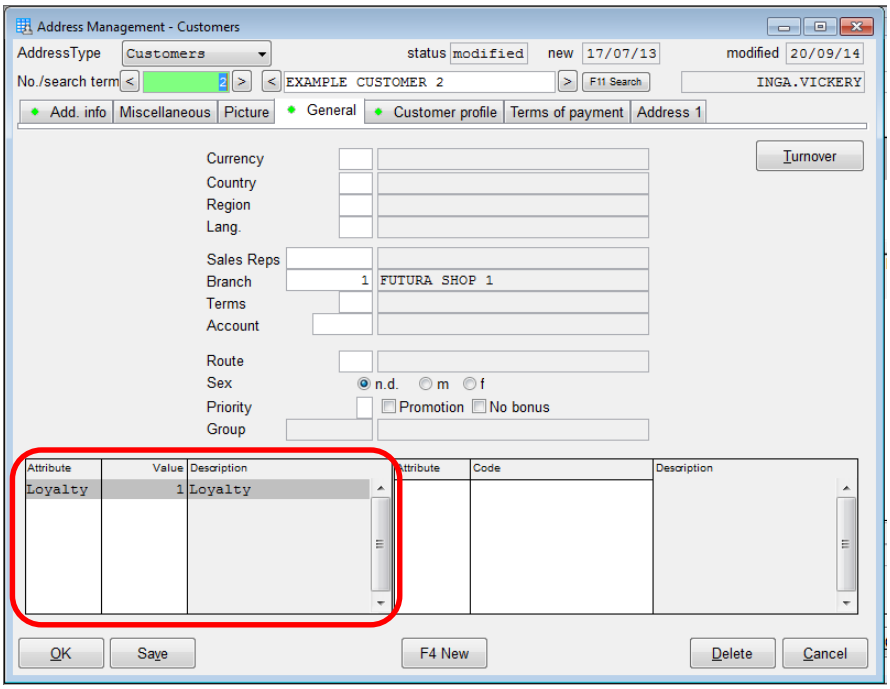
Attaching an Address Attribute to a Promotion Mix and Match offer.

It is also possible to attach addresses to temporary discounts using the Promotion Mix and Match screen.
It is possible to do this through the use of Address Attributes which are attached to the relevant personnel or customer address records of whom you would like the discount to be applied to.

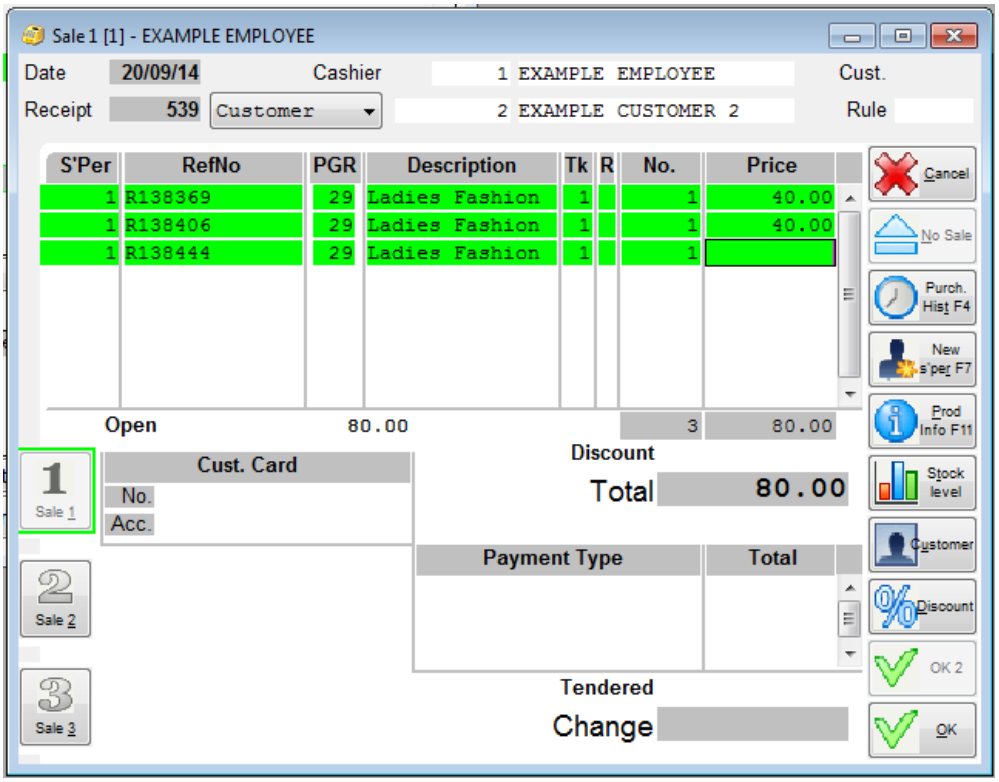
A promotion record can only have 1 attribute type attached to it (in the area that is circled below).



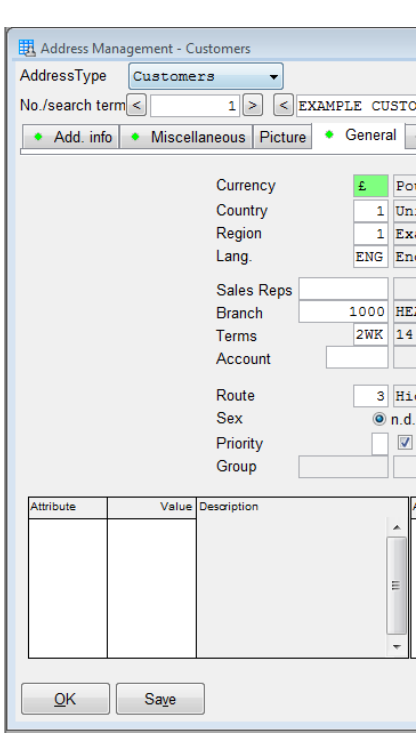
The example promotion above grants a 3 for 2 offer for any customers that have a loyalty attribute attached to their address record. This will ONLY apply if the transaction is linked to the record

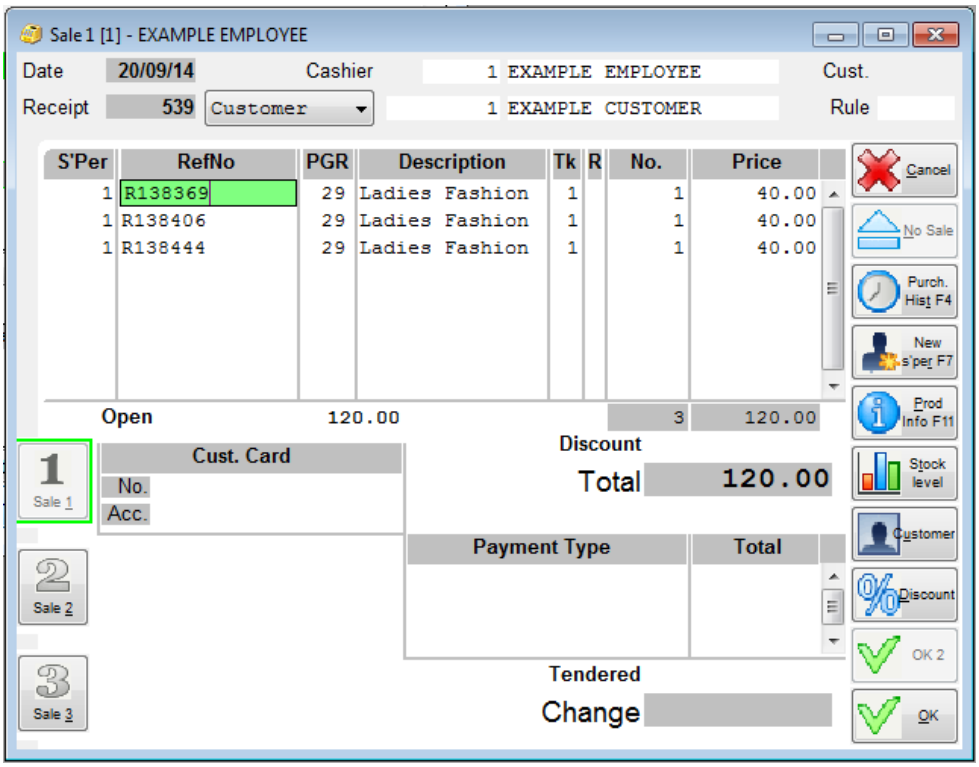


The screenshot on the previous page shows that Customer Number 2 has had this attribute added to their profile. This means that when their customer number is attached to a transaction, the 3 for 2 offer entered in Promotion Mix and Match (88) will automatically be applied. This is visible in the screen shot below.



However, Customer Record 1 does not have this attributed added meaning they do not meet the requirement for this offer. This is displayed in the screenshots below where the offer has not been applied.





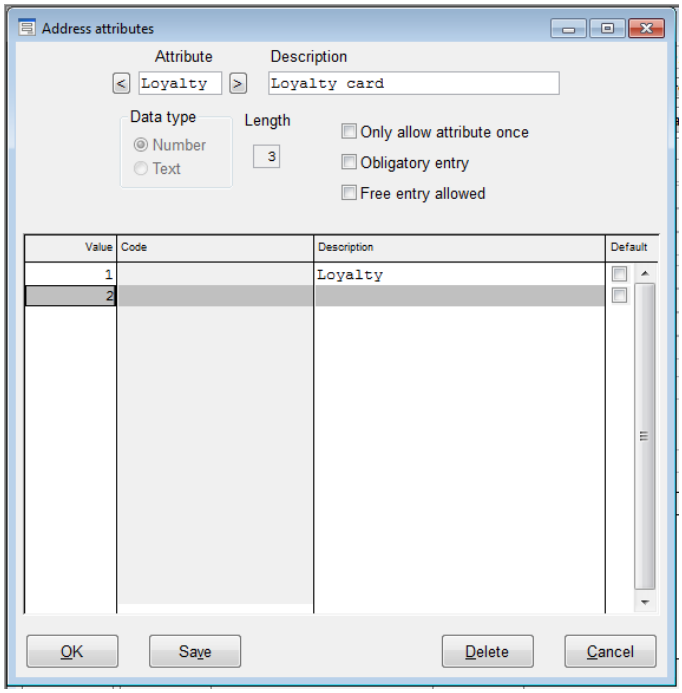
Benefits of this type of discount against addresses.

This type of discount can be used for the following reasons;

- Offer exclusive promotions to you customers who have signed to a newsletter or loyalty card.
- Action special offers to VIP marked customers.
- In store events/evenings for store card holders.
- If you have been to or held an event or fair, then mark customers in your database that you have invited or came for exclusive discounts. E.g. New store opening, Charity night or Gala.
- Gives the chance to create personalised offers for customers or personnel to encourage spending. E.g. Who brought a certain type of product(s) and create an offer targeted at them.
- Create exclusive staff promotions to encourage spending.
- Create a list of customers that have not spent in the last 6 months and target a promotion for them.

Above are just suggestions on how these could be used, which may increase footfall, items per basket and create uplift in sales but this is dependent on how these are targeted. Tools such as Address Lists, Purchase History Information against a customer and Futura4Data (if the Address Export Import has been purchased) can be used to analyse who could be targeted. Other statistical reports can also be used.

Step by Step: How to create an address attribute?



1. Enter the short attribute code and the long description in the fields at the top.

2. Select your Data Type (Number/Text) and enter the maximum length allowed

3. Select whether you would like this attribute to be
   Only allow attribute once
   Obligatory entry
   Free entry permitted

4. Now create your values or codes within the table

5. To select a default selection against this attribute, click one of the boxes to the right hand column of the table. This is only essential if you have chosen the obligatory entry click box above.

6. Press save and OK.

7. Now go through to you Address Management screen and select the General tab.

8. Choose either the 'Value' or 'Code' column and enter you attribute. You can use Alt+S here to bring up all the available selections under that column. (Number/Values are in the left hand table. Text/Code are in the right)

9. Choose the option you would like to attach against your selection. You can also use Alt+S here to show all the options entered that selection.

10. Once you have finished press save and OK.

Step by Step: How to attach an address attribute

Important note: To use the Search Function, either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search

1. Open the Promotion Mix & Match screen.

2. Find out the next blank special order number. (this can be done by entering '1 ' and using the search function. Choose a number that is not visible in the menu up to 999999 characters and press ESC to exit the menu)

3. Enter the special order number and press Enter

4. Add your offer description and press Enter.

5. Attach your Reason Code (You can use the search function to bring up a list of current reasons)

6. Click in the branches field and enter your branch range(s) that you would like this offer to be valid in and press Enter
   (You can use the search function to bring up a branch list. If Range Definitions have been created, you can search for these by enter +: and the standard search function)

7. Enter the valid from date and press Enter (if this is left blank, then the promotion will be valid as soon as it is booked)

8. Enter the valid to date and press Enter (if this is left blank, then this will run indefinitely)

9. Select the address attribute from the dropdown menu.

10. Select the attribute value which an address record must have to be valid.

11. Click in the first column of the Combination Group and enter 1. Then click in the second column and enter a description of this combination.

12. Click in the first blank row of the item selection table and enter you filter. (You can use the search function)

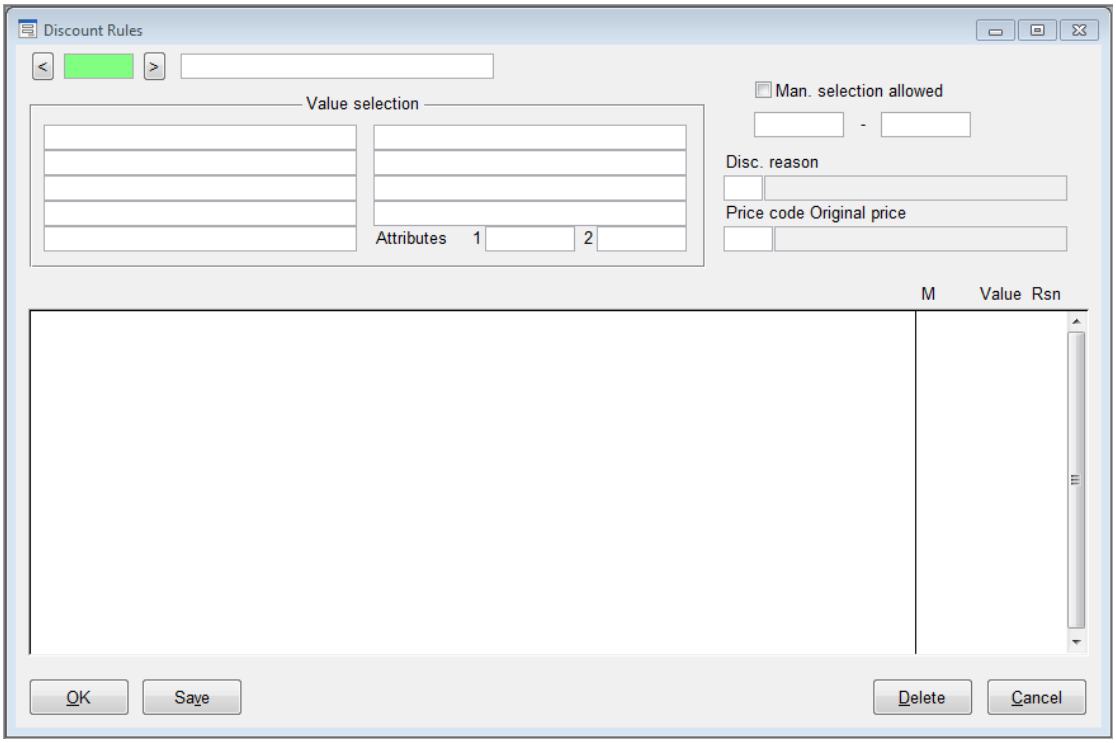
13. Click in the quantity column and type in the quantity of items with these criteria that the customer MUST purchase for this offer.

14. Add the values in the correct offer, depending on the promotion you are setting.
    An example of this set up is on the following page.

15. Press Save

Discount Rules - Further address linked discounts

The "Discount rules" function is used to create special definitions for granting discounts, i.e. special discounts for specific items can be automatically be granted to personnel or registered and unregistered customers during sales.



They are only available for use at the tills in store.

When discount rules are applied, any definitions regarding a fixed price, maximum discount, minimum margin, etc. will be taken into account.

What categories are available to enter into the Value Selection?

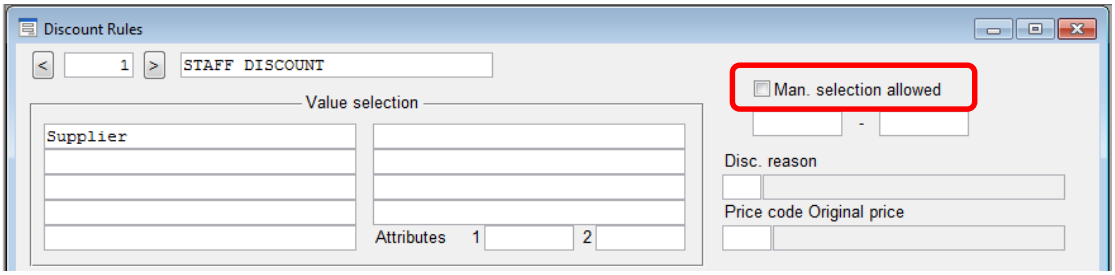
The categories that are available to be used as item selection criteria are;

- Product Group
- Sub Group
- Type
- Group Number
- Unit
- Variant
- Reference Number (Futura SKU)
- Branch
- Statistical Period
- Origin
- Sales Area
- Supplier
- Standard Item
- Price Range
- Reduced
- Item Attribute 1
- Item Attribute 2

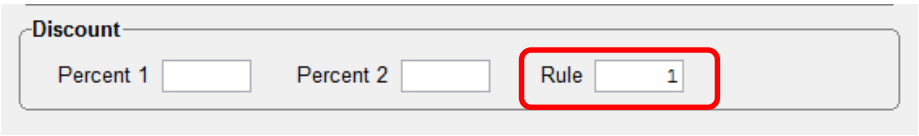
Automatically applied Discount Rules

For a Discount Rule to apply automatically during a transaction, the following 2 settings must be in place;

1. The Man. Selection Allowed box must be unticked.



2. The Discount Rule is assigned to either the Customer or Personnel address record.
   - Personnel Address: Working Times tab



   - Customer Address: Terms of Payment tab

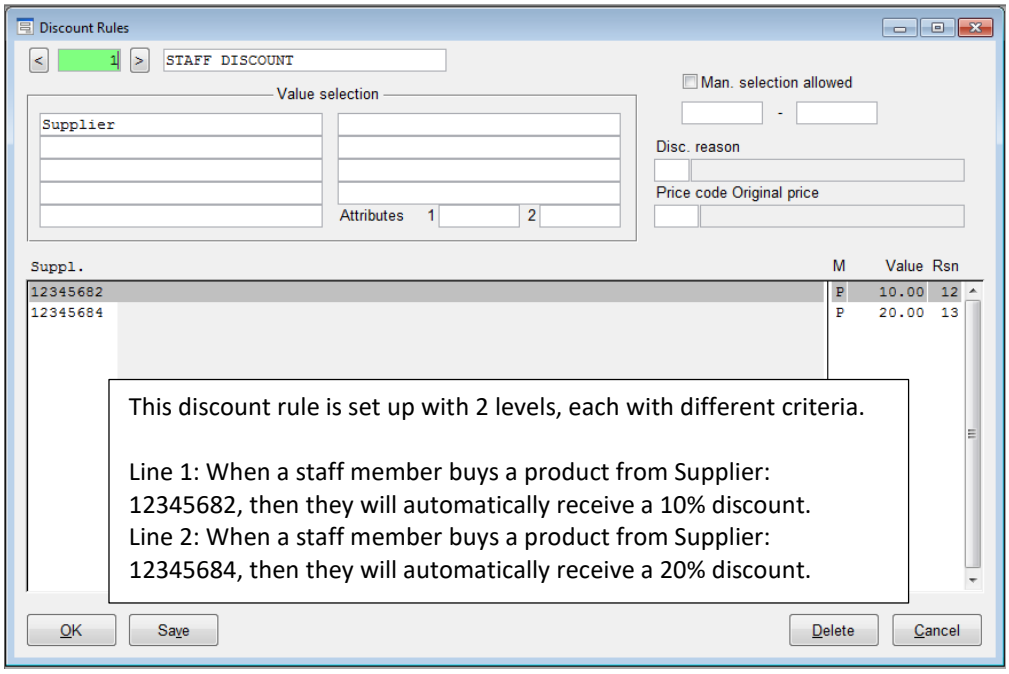
Step by Step: How to create a Discount Rule (without using Item Attributes)

1. Open the Discount Rule screen.
2. Find out the next blank Discount Rule number.

   This is done by either clicking in the field and pressing ALT+S on your keyboard or by carrying out a right-hand click in the field and selecting search. Choose a number that is not visible in the menu up to 999999 characters.
3. Choose your category headings in the Value Selection fields.
4. Enter the criteria option that you would like an item to fall into.
5. Choose the mode letter for the method that you would like this item to be discounted by in the 'M' column.
6. Either enter the new price or the amount that you would these items to be discounted by in the 'Value' column. (This is dependent on the mode that you have selected.)
7. Enter the Price Change Discount Reason code that you would like to apply to this discount. (This can be useful if you have 2 or more rows in this rule as each line can have their own code).

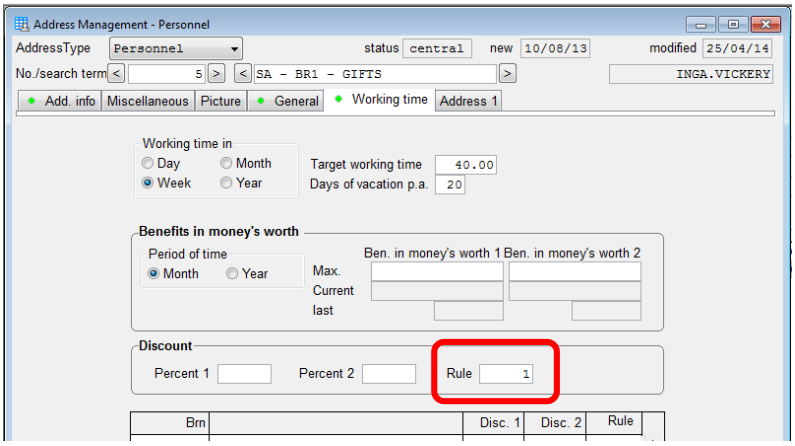
   If all rows are to use the same Price Change Discount Reason, then this can be entered in the Disc. reason field.

EXAMPLE SETTINGS: Without Item Attributes



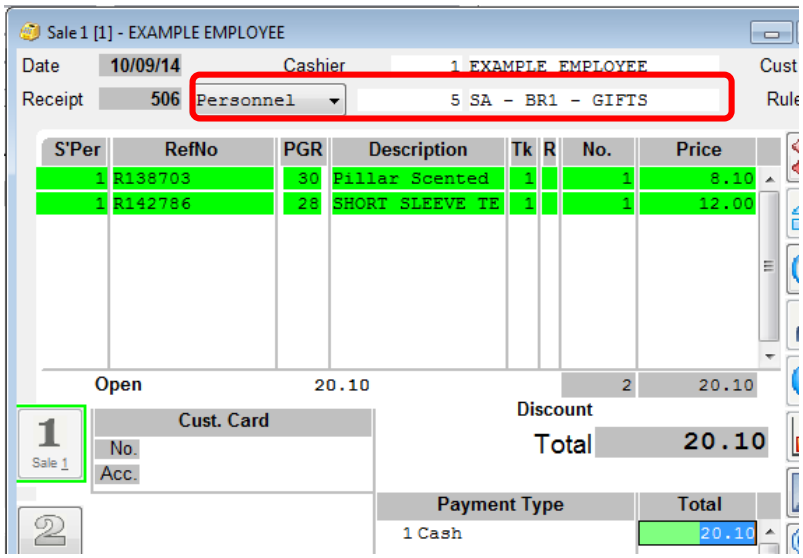
This discount rule is set up with 2 levels, each with different criteria.

Line 1: When a staff member buys a product from Supplier: 12345682, then they will automatically receive a 10% discount.
Line 2: When a staff member buys a product from Supplier: 12345684, then they will automatically receive a 20% discount.

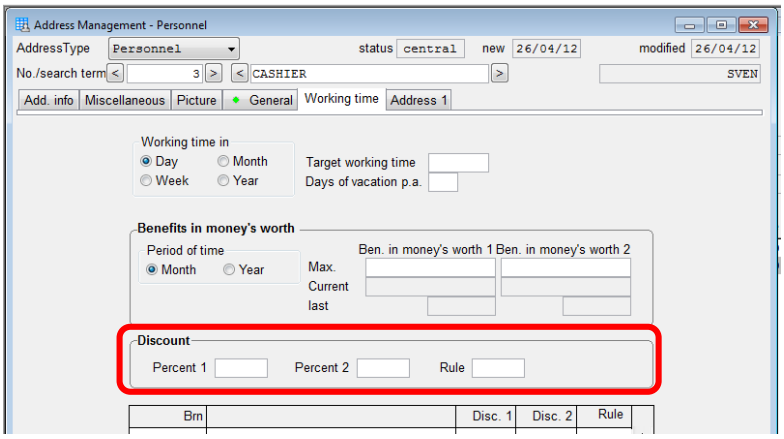


Personnel No: 5 had this discount rule assigned to their address record.

A sale has been put through for this member of staff where the discount outlined above has been applied.
This is clearly displayed in the example receipt below.

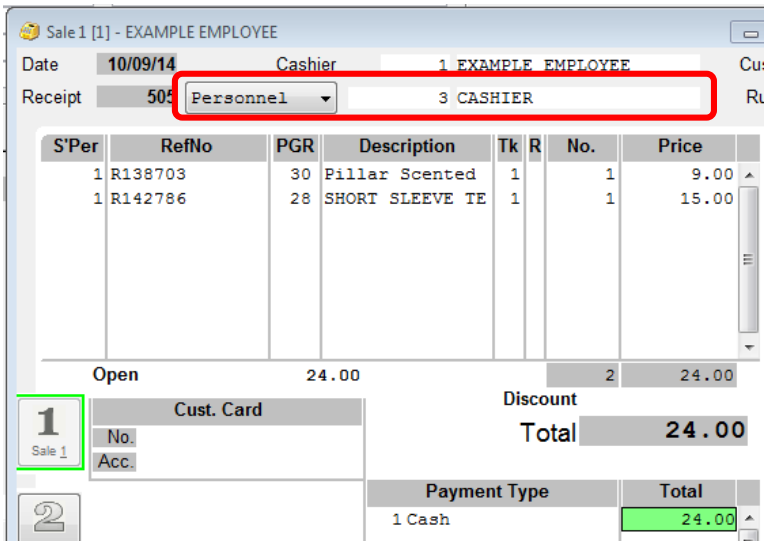


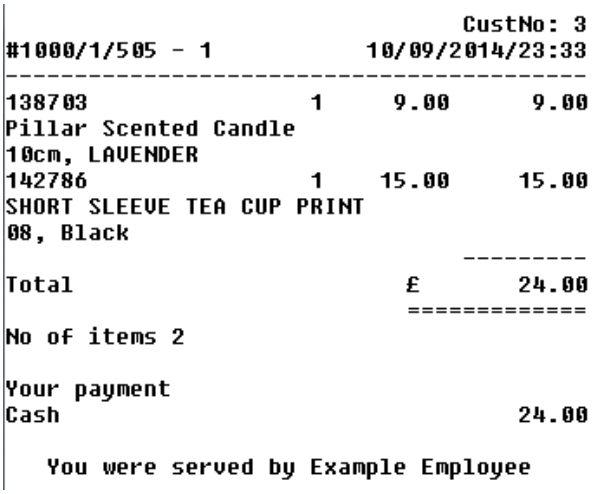

```
                                    CustNo: 5
#1000/1/506 - 1              10/09/2014/23:35
-----------------------------------------
138703                 1     8.10      8.10
Pillar Scented Candle
10cm, LAVENDER
** Orig 9.00 Disc 10.0%
142786                 1    12.00     12.00
SHORT SLEEVE TEA CUP PRINT
08, Black
** Orig 15.00 Disc 20.0%
                                   ---------
Total                          £       20.10
                                 =============
No of items 2

Your payment
Cash                                   20.10

Granted discount:
Staff Discount 10%                      0.90
Staff Discount 20%                      3.00
                                   ---------
Granted discount total:                 3.90

   You were served by Example Employee
```



Personnel No: 3 has not had this discount rule assigned to their address record.

A sale has been put through for this member of staff for the same items where the discount outlined above has not been applied.





Benefits:

- Allows you to control what discounts are being given away. If there are strict controls on certain products, you do not have to rely on staff applying the discount correctly. This gives provides greater controls to the amount of money is given away at the till point.
- Can improve transaction speeds as the discount will apply automatically.
- Manual discount authorisation (if in place) would not be requested.
- Allows different “discount bandings” that can be applied based on certain criteria (e.g. season codes.)
- As branches are available within the selection criteria, it is possible to enter these rules to only be valid in certain branches.
- Changes to your staff or customer discount policies can be changed on mass as the Discount Rule can be adjusted and the change will apply to all addresses that it has been assigned to.
- Temporary or probation staff members can either have a different Discount Rule set against their address records to permanent staff. Or they can be left blank so the discount is not applied automatically at all.

Step by Step: How to create a Discount Rule (using Item Attributes)

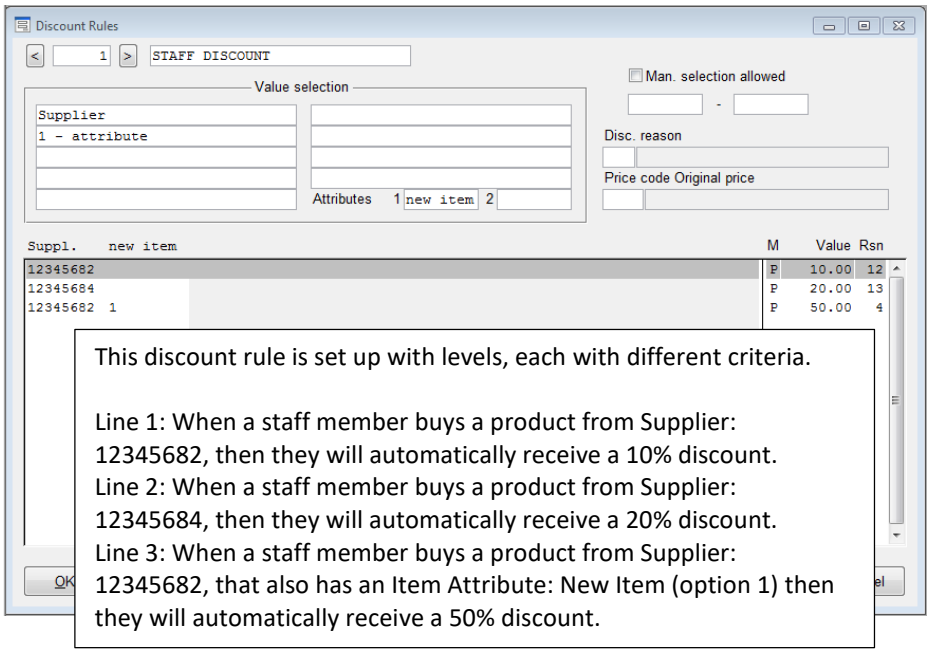
1. Open the Discount Rule screen.
2. Find out the next blank Discount Rule number.

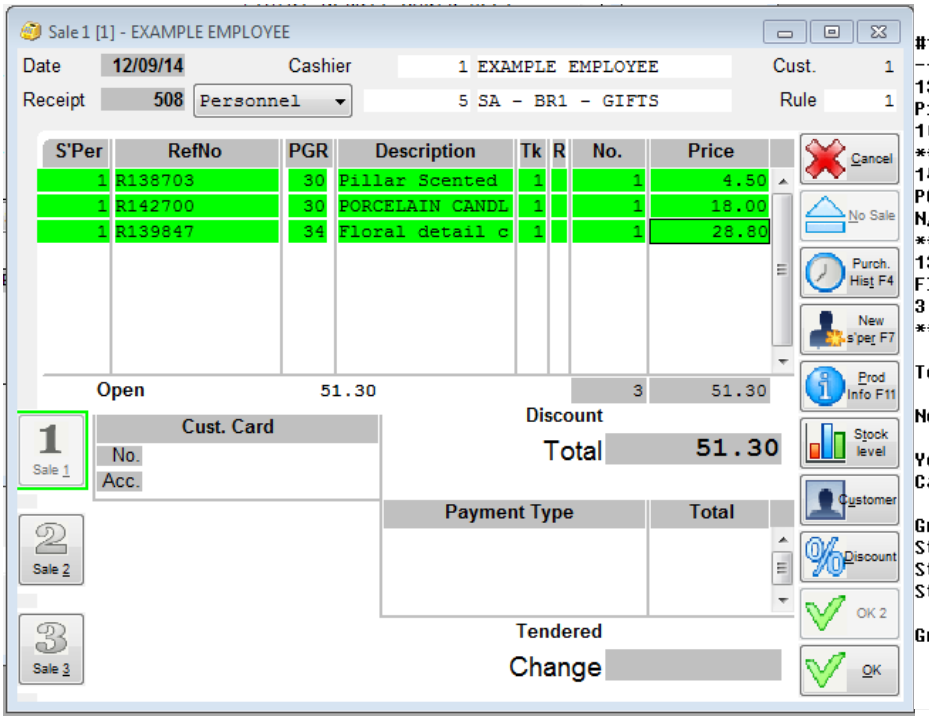
   This is done by either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search. Choose a number that is not visible in the menu up to 999999 characters.
3. Choose your category headings in the Value Selection fields.
4. To add an item attribute heading to the table, select the '1 – attribute' to the value selection fields.
5. Enter the attribute name to the Attributes 1 field. This is done by either clicking in the field and pressing ALT+S or by carrying out a right-hand click in the field and selecting search.
6. Repeat steps 4 and 5 if a second attribute is required.
7. Enter the criteria option that you would like an item to fall into, include the item attribute columns.
8. Choose the mode letter for the method that you would like this item to be discounted by in the 'M' column.
9. Either enter the new price or the amount that you would these items to be discounted by in the 'Value' column. (This is dependent on the mode that you have selected.)
10. Enter the Price Change Discount Reason code that you would like to apply to this discount. (This can be useful if you have 2 or more rows in this rule as each line can have their own code).

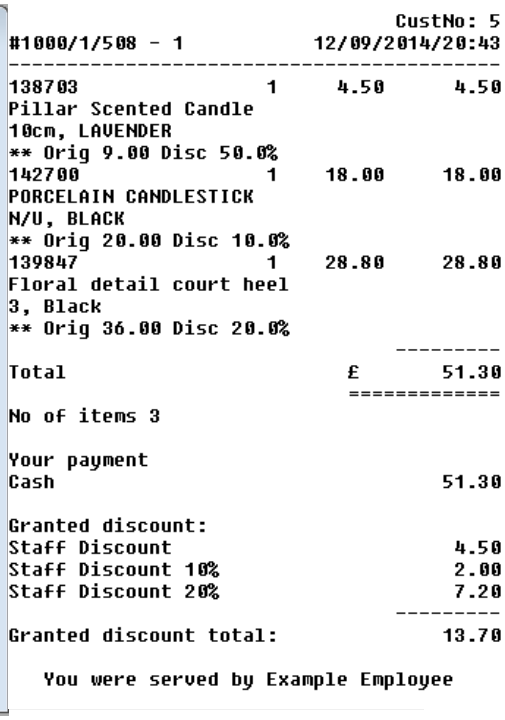
    If all rows are to use the same Price Change Discount Reason, then this can be entered in the Disc. reason field.

0

EXAMPLE SETTINGS: With Item Attributes







A sale is put through for Personnel No: 5 where the discount outlined has been applied.

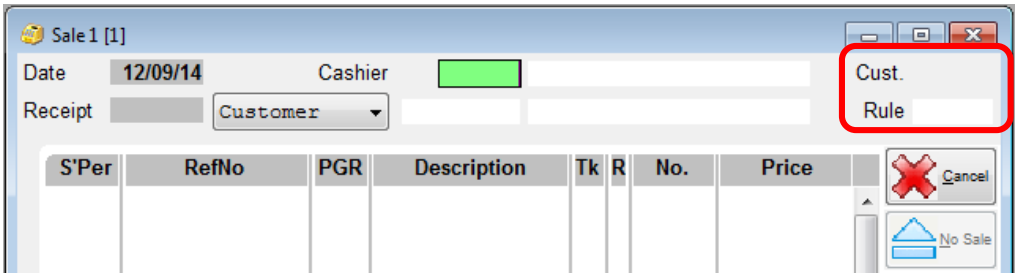
Item R138703 from Supplier:12345682 has the item attribute which is why this item has been discounted by 50%.

However, item R142700 from the same supplier does not have this item attribute, so falls into the criteria where 10% is taken off the original price.

This is reflected in the receipt.

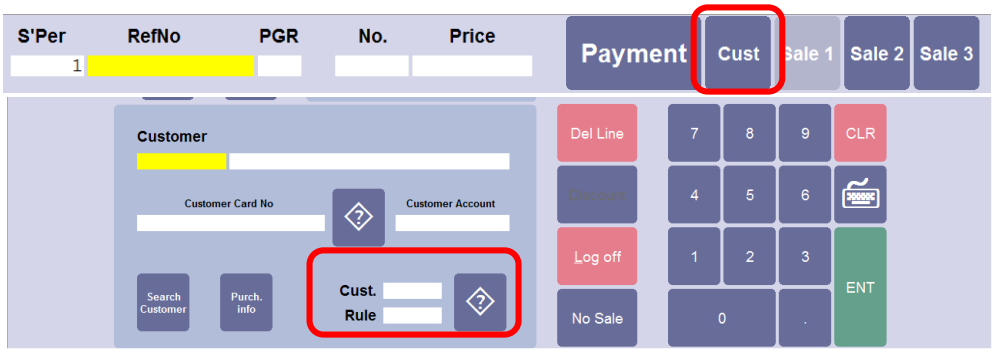
Where are these Rules applied at the till point?

PCPOS



TOUCHPOS

By pressing the Customer button at the top of the screen, you will then be able to attach a Discount Rule from the pop-up that appears in the bottom left-hand corner.

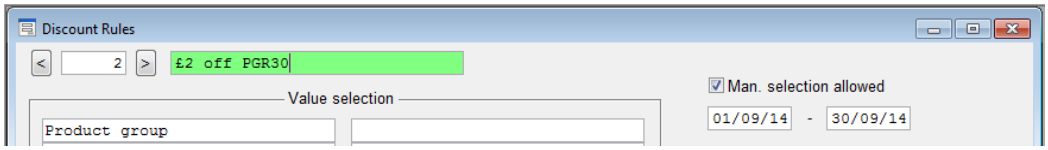


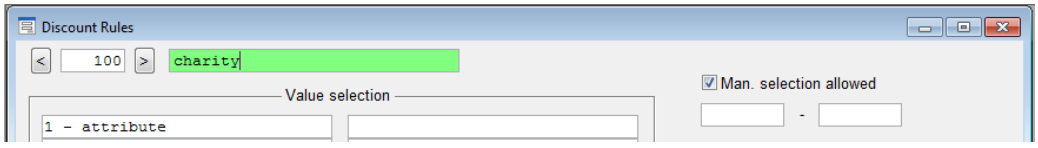
Time Periods - What happens if a date period is not entered or is incomplete?

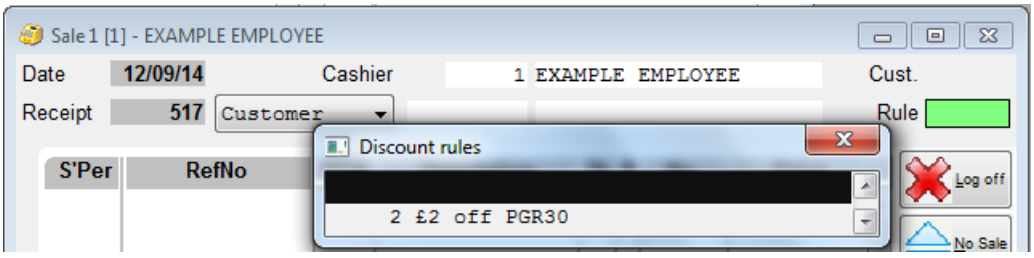
If the "Man. Selection Allowed" is ticked, but there are no date periods entered (or only one field entered), then the rule will not be displayed in the option list.

This is demostrated in the screenshots below where Discount Rule 2 is visible in the till menu, but Discount Rule 100 is not.

NOTE: If only one of the date period fields were populated, then the Discount Rule would also not be visible in the till menu.





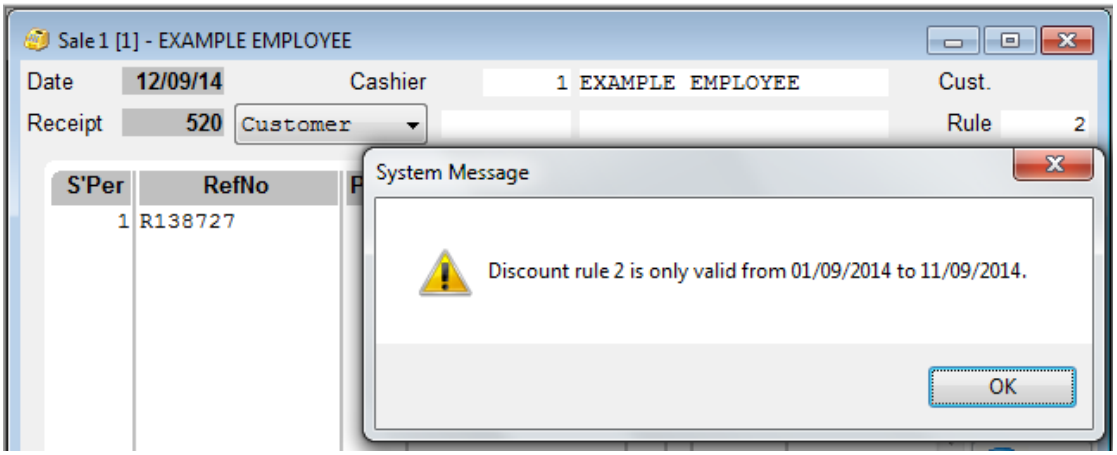


Time Periods - What if today does not fall within the “from” and “to” date?

If today’s date does not fall within the date period entered in the Discount Rule, then the rule will;

A) Not be visible in the menu.

B) If they tried to force entry by entering the Discount Rule number, then the following message will appear.



Can manual Discount Rules still be applied automatically?

It is possible to assign Discount Rules that have been marked to apply manually, to an Address Record to apply automatically.

Also, if the rule is attached to an address record, then the system will ignore any date periods when applied manually.

Address Management for Discount Rules

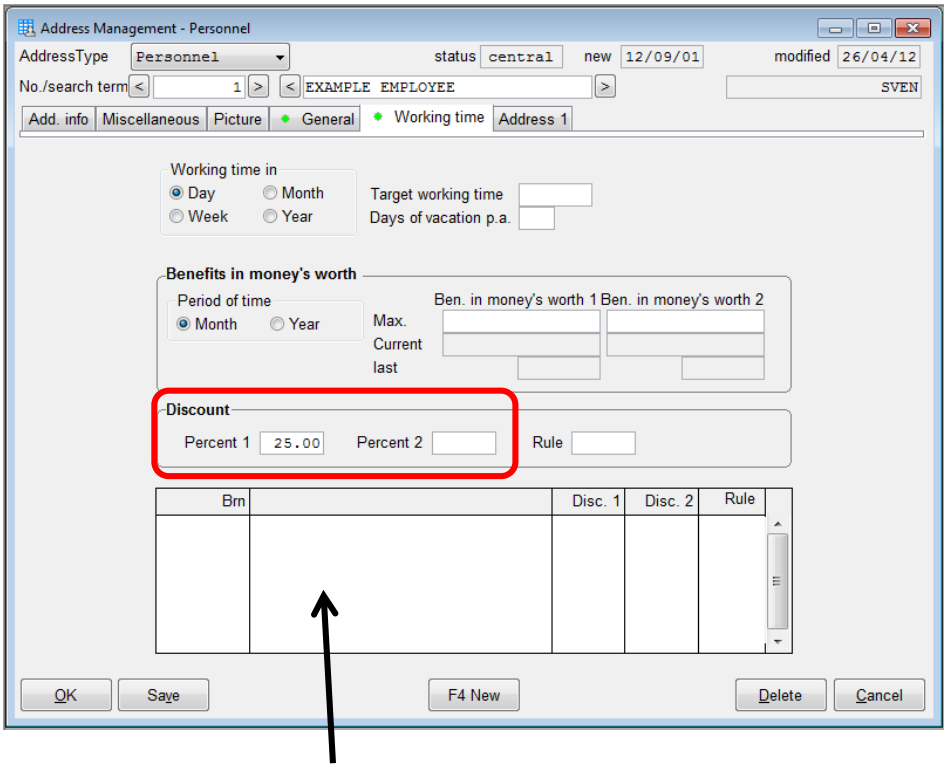
The information explains above how a Discount Rule can be attached to an Address Record as a blanket rule.

However, there are other fields available that a discount value can be applied

ADDRESS MANAGEMENT – PERSONNEL: Working Time tab

Percent 1 & 2 - Up to 2 percentage discounts can be entered against a personnel record. If only one of these fields are defined, then the discount will automatically be applied. If both discounts are defined, then the discount will need to be granted manually.

Rule - 1 Discount Rule can be entered, detailing the criteria and item must meet before discount outlined is applied. This will only be applied at the POS and is not available within Order Management. This discount will automatically be applied when the customer number is entered as part of the transaction in all branches.



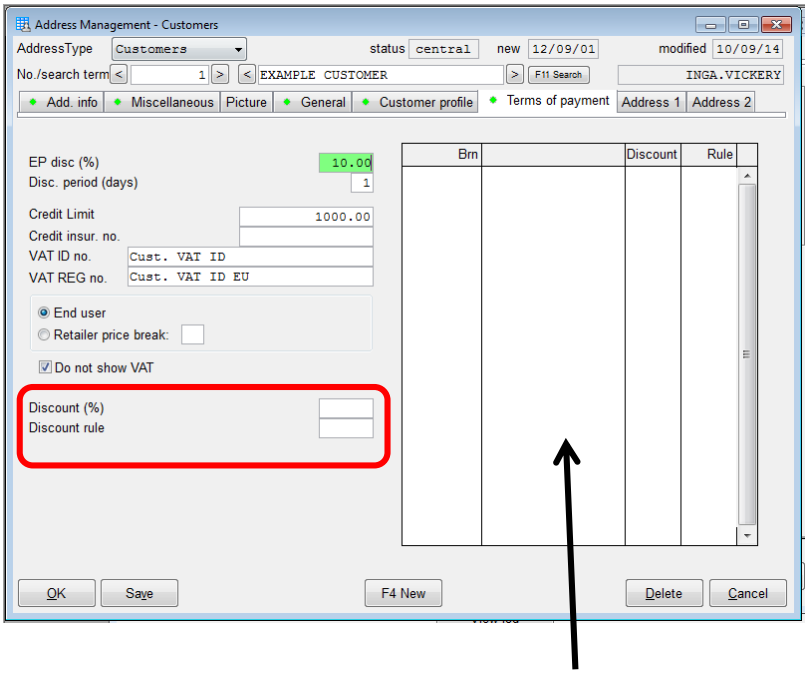
Discount Table - This enables different discounts to be applied depending on the branch that the sales transaction is processed in. e.g. staff maybe allowed more discount in a standard store to an outlet store. This table can allow the different rules to be created and applied accordingly. Range definitions are not available here.

Any entries made here, take a higher priority over any discounts defined in the Percentage 1, Percentage 2 or Rule fields.

ADDRESS MANAGEMENT – CUSTOMER: Terms of Payment tab

Discount (%) - A percentage value can be entered in this field which will apply to all item types (excluding Fixed Price). This will be applied at the POS and in the Customer Order screens.

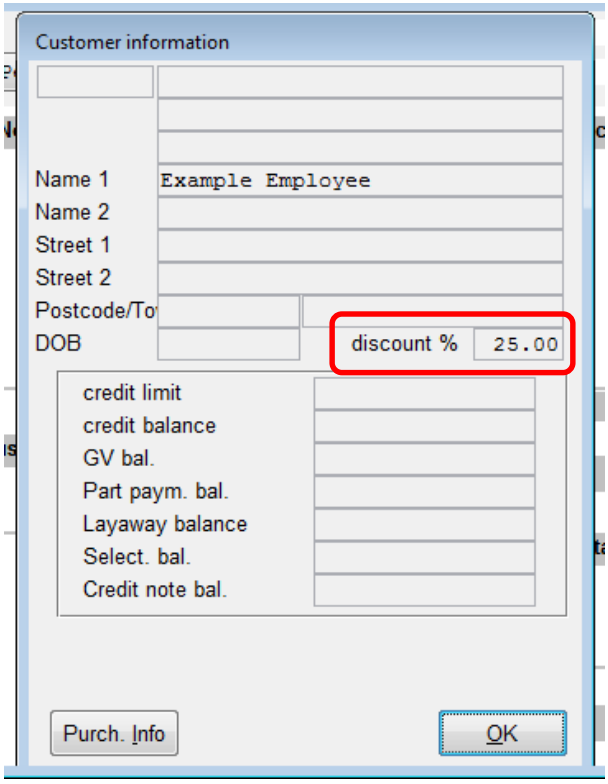
Discount Rule - 1 Discount Rule can be entered, detailing the criteria and item must meet before discount outlined is applied. This will only be applied at the POS and is not available within Order Management. This discount will automatically be applied when the customer number is entered as part of the transaction in all branches.

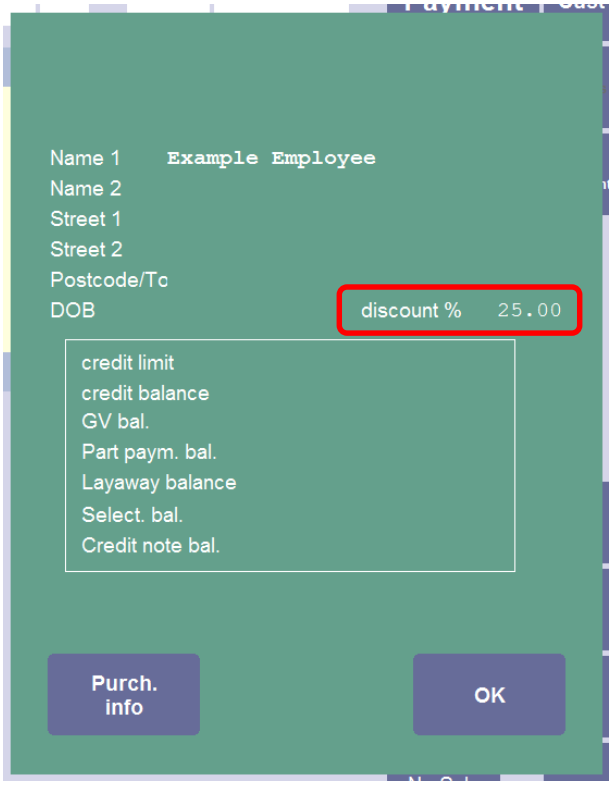


Discount Table - This enables different discounts to be applied depending on the branch that the sales transaction is processed in. e.g. customers maybe allowed more discount in a standard store to an outlet store. This table can allow the different rules to be created and applied accordingly. Range definitions are not available here.

Any entries made here, take a higher priority over any discounts defined in the Discount (%) or Discount Rule fields.

Any discount value entered in the Percentage 1 field for Personnel, and the Discount (%) field for Customers will show in the Customer Information window that appears when a record is attached to a transaction.





Benefits of this type of discount.

This type of discount can be used for the following reasons;

- Offer exclusive promotions to you customers who have signed to a newsletter or loyalty card.
- Action special offers to VIP marked customers.
- In store events/evenings for store card holders.
- If you have been to or held an event or fair, then mark customers in your database that you have invited or came for exclusive discounts. E.g. New store opening, Charity night or Gala.
- Gives the chance to create personalised offers for customers or personnel to encourage spending. E.g. Who brought I certain type of product(s) and create an offer targeted at them.
- Create exclusive staff promotions to encourage spending.
- Create a list of customers that have not spent in the last 6 months and target a promotion for them.

Above are just suggestions on how these could be used, which may increase footfall, items per basket and create uplift in sales but this is dependent on how these are targeted. Tools such as Address Lists, Purchase History Information against a customer and Futura4Data (if the Address Export Import has been purchased) can be used to analyse who could be targeted. Other statistical reports can also be used.

Testing promotions before go live

It is possible to test a promotion in Head Office before going live. This enables the promotion to be tested to ensure they are set up correctly before the offers go live in branches. You must ensure that you enter the Head Office branch number within the filter field, possibly on its own line with valid dates.

When you can test the promotion in Head Office is dependent on the Promotion type as certain ones need to be booked overnight, even in the Head Office. These are detailed below.

- **Must be booked overnight first before testing**

  Promotion Qty and Price

- **Can be tested immediately by signing out of the Navigator and then back logging back in.**

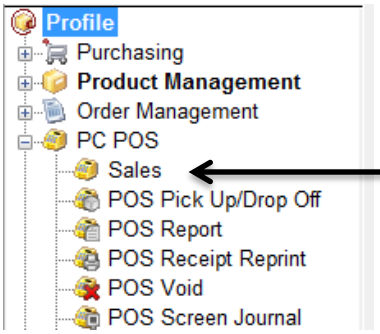
  Promotion Mix and Match
  Promotion on Total
  Discount Rules

To enable a member of staff to test a promotion in Head Office, there are a few settings that need to be in place first;

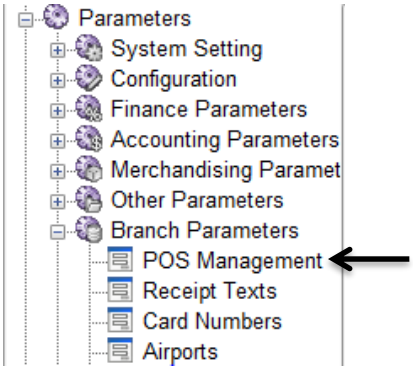
A) Head Office branch must be included in the branch filters of the promotion with a valid date range which includes today.

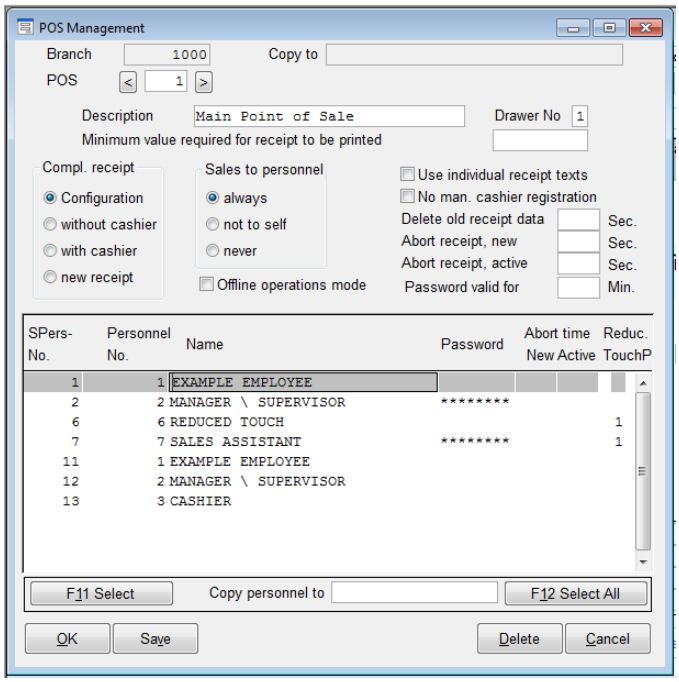
Branches	valid frm	valid to
1000		
10,20,30	10/11/14	16/11/14

B) The member of staff must be given access to the Sales screen in the Navigator.



C) The member of staff must have been added to the POS Management screen, or at least told which cashier number (and password) they can use to test the offer.





Note: If the Password column contains stars for a row, then a password must be entered to use that Sales Personnel Number. If it is blank, the no password will be requested.

Step by Step: Testing an offer in Head Office

1. Make sure that Head Office has been added to the branch filter of the offer you would like to test and that it has a valid date range.
   Add these details if they are missing.

2. For Promotion Qty and Price offers: Make sure that the offer has been 'Booked'.
   (You will need to wait for polling to go through for an offer to book.)

3. Press OK

4. Sign out of the Futura Navigator.

5. Log back into the Futura Navigator.

6. Open the Sales screen
   (Depending on system settings, a till number maybe requested. Enter till 1)

7. Enter your Cashier Number (and Password if required)

8. Enter the items and quantities for the Promotion Qty and Price offer you are testing.
   (To remove/void items from the transaction, press F9 on your keyboard)

9. Make sure the CANCEL button is used to exit the sale.

10. Press YES to the system message: "Terminate Sale?"

Transferring these discounts between Head Office and the branches

Each night, these promotion and discount files are transferred from Head Office to the Branches as part of the normal overnight processes.

These files are visible in the Output Manager: Fax/Modem/Email module.

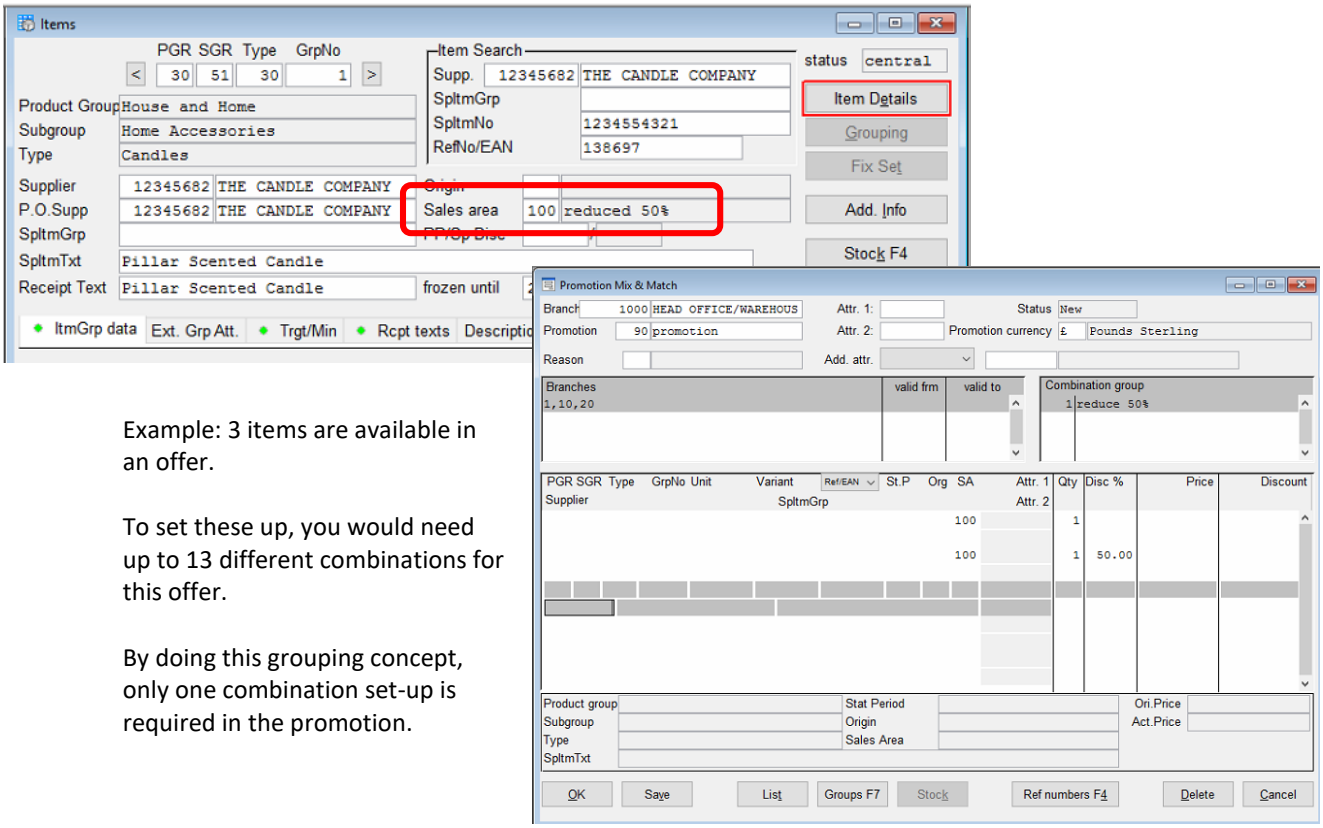
- **Promotion on Total** **- transfer file type 77 “Total Discounts**
- **Promotion Qty and Price** **- transfer file type 23 “Price Changes”**
- **Promotion Mix and Match** **- transfer file type 33 “Linked Items”**
- **Discount Rule** **- transfer file type 69 “Discount Rules”**

  Discount rules are also not transferred in the franchise system.

Tips for grouping and reporting

For Version 3.26A and earlier

It is often recommended to keep one of the Origin or Sales Area’s free and use this as a grouping field for use in promotions. This is especially useful for Promotion Mix and Match screens as this allows you to attach a common field between all your items that you would like in the offer, which you can then use to select in the Promotion Mix and Match screen.
Please note that Sales Area is being used as an example.



Example: 3 items are available in an offer.

To set these up, you would need up to 13 different combinations for this offer.

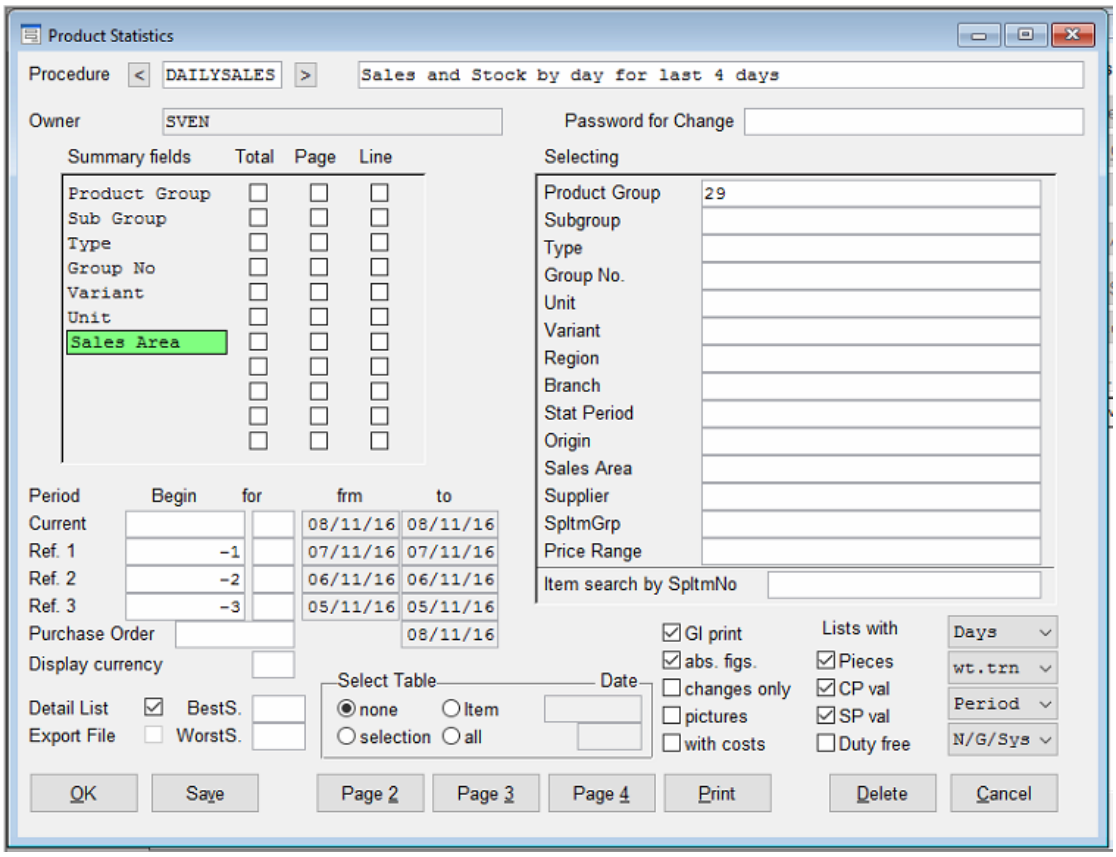
By doing this grouping concept, only one combination set-up is required in the promotion.

Reporting

The bonus of using an Origin or Sales Area field, is that whenever these are changed in the system, a new internal statistical number is assigned to the item and date stamped. If these are then used in reports such as Product Statistics.

By placing the Sales Area/Origin option at the bottom of the Summary field area, it is possible to see the different sales under the different Sales Area/Origin settings.
The report must be set:

- With date ranges being analysed, must cross over where the Sales Area/Origin changes were made
- Page 2: 'Analysis based on' → This should be set to 'Statistics'
- You should preferably, not have and Sales Area/Origin filters

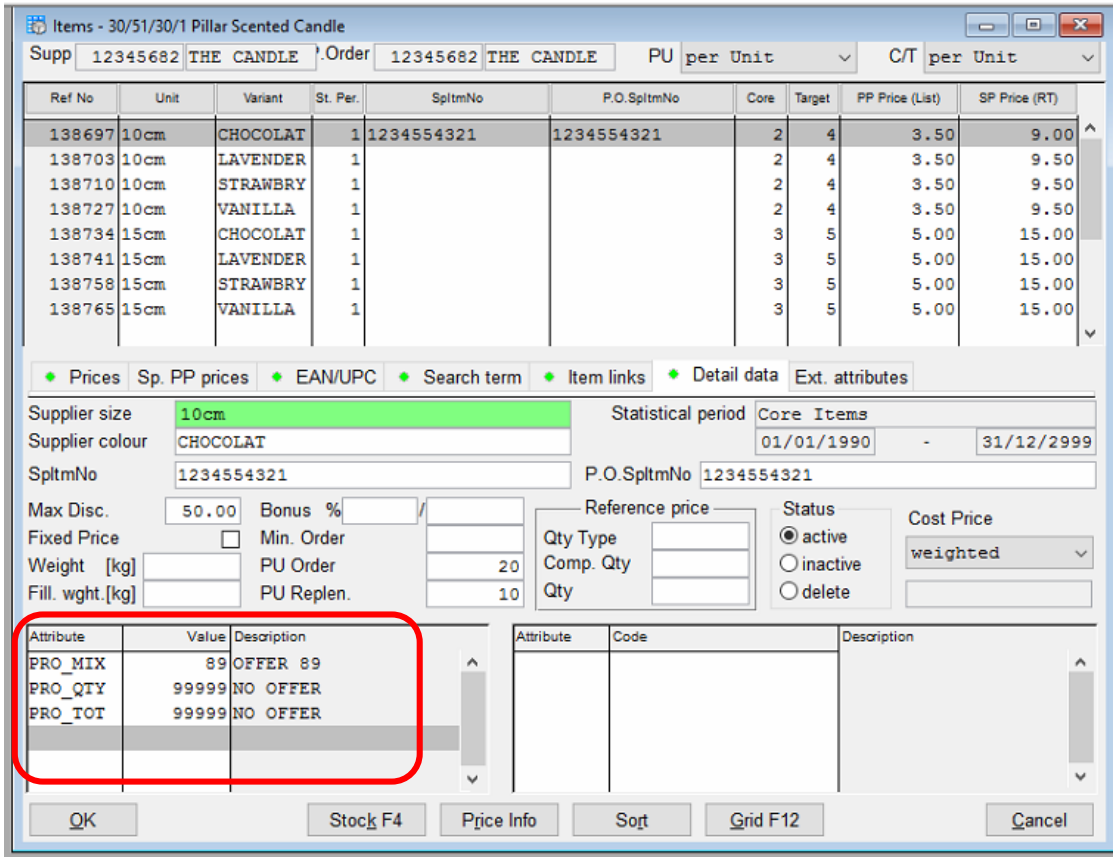


The data for an item that has had two different Sales Area/Origin's in the date period will then be split in two. This mean you can see how many sales were made before the offer, during the offer and after (if you then remove the setting). You will also see the stock being booked from the old option and into the new so that you always have the one pool of stock for the item.

IMPORTANT NOTE: The Sales Area and Origin is held at style level, so this grouping method will apply to all items that share the same PGR/SGR/TYPE/GRP NO

For Version 3.26B and later

From version 3.26B it I possible to add Item Attributes as filters for the Promotion By Qty & Price and Promotion Mix & Match modules. If you have this version or later and cannot see these fields, you will need to get a configuration setting changed so that they are visible for use.



This uses the same concept as explained in the section 3.26A and earlier, where you are able to attach a common field between all your items that you would like in the offer, which you can then use to select in the modules such as Promotion Mix and Match.

The benefit of having the Item Attributes filters is:

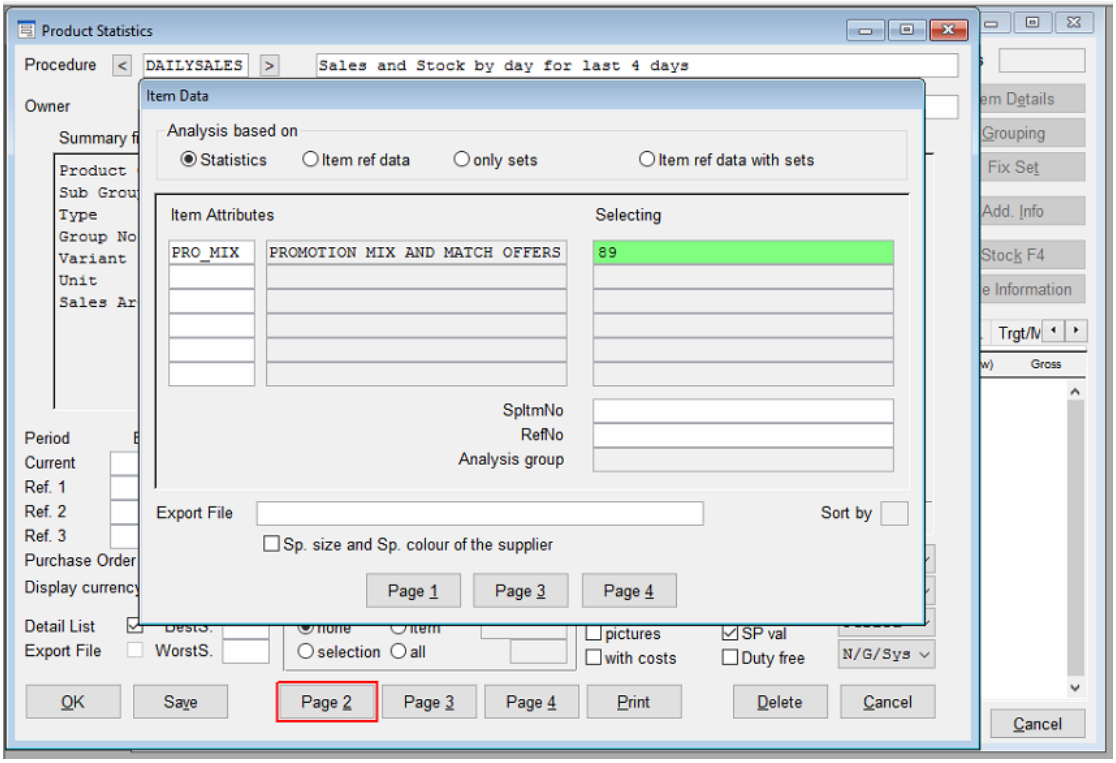
- You can group together easily at Item Reference Number level rather than at style level.
- Set up different attribute for each module. You can then enter the value in a way which indicates which offer number this is set up in. This makes it easier to identify for offer changes etc.

Reporting

When an Item Attribute is changed, it is not date stamped in the same way as the Sales Area/Origin type fields. This means that the reporting idea for version 3.26A and earlier above is not available based on the Item Attributes

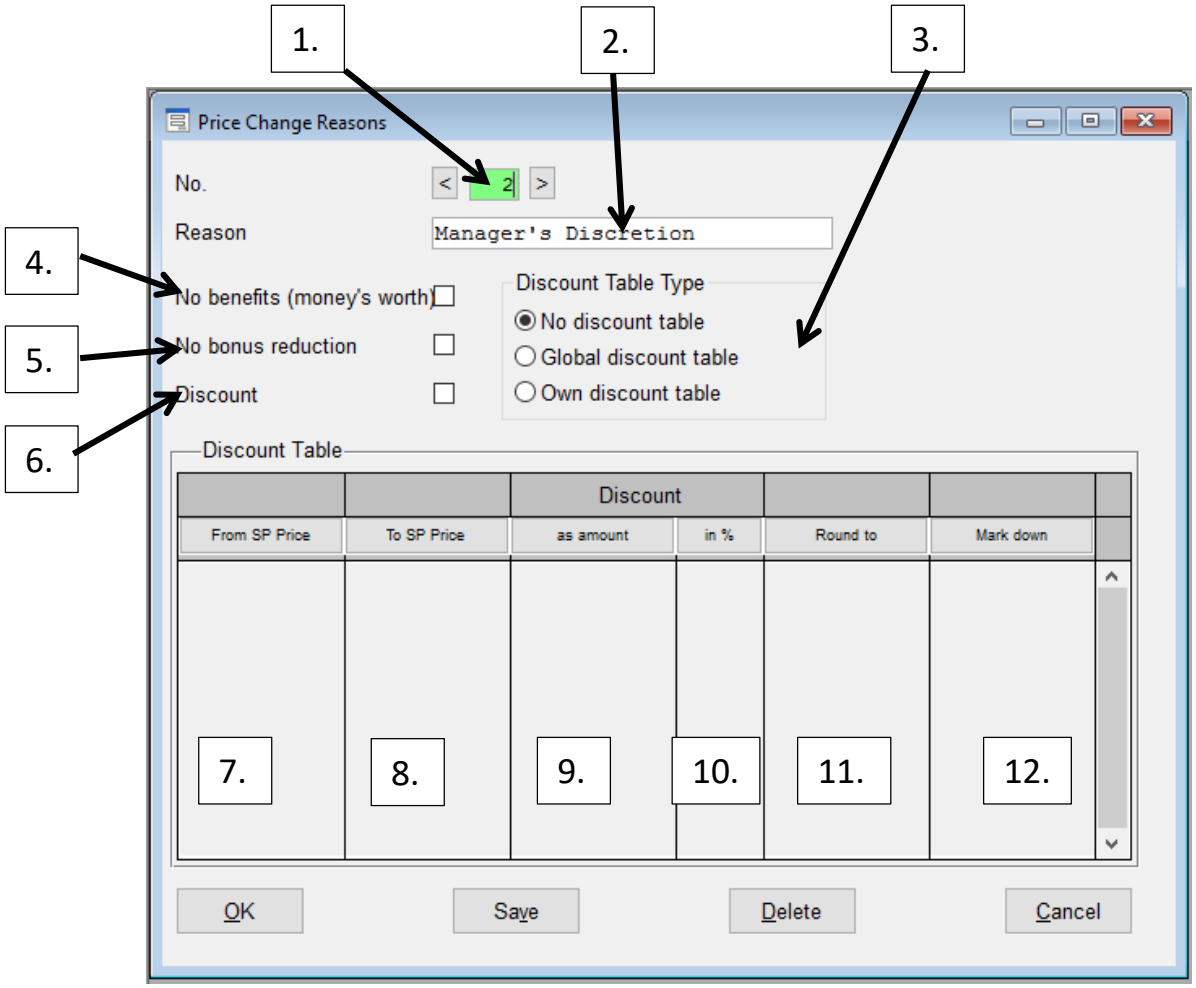
Due to this, I would still recommend using a Sales Area/Origin type fields to just mark that this item is currently in a promotion and unmark it when it comes out of promotion.

However, the Item Attribute does give you option to add a filter in the Product Statistics on Page 2 without interfering with the Sales Area/Origin's. This means you could easily view items that are currently in a certain promotion and view all the data.



Quick Field References

Quick Reference: Price Change Reason



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1. **Price Change Reason No.**

This is the record number that this Price Change Reason will be saved as within the database.

2. **Reason**

This is where the description of the price change rule is entered, which is then linked to the No. and printed on receipts.
It is important to also use the description field to help identify what the price change reason should be used for and find rules when required.
Please Note: If you change the description for a number, all historic discounts using that number will also show under the new description. The old description is not retained.

3. **Discount Table**

Select the discount table type.

No Discount	- This is an open discount meaning the any discount percentage or amount can be entered when this reason code is applied.
Global Discount Table	- Any reason code that has this option selected will use the same rules entered in the discount table. If the rule is changed in any of these reason codes, it will apply it to all.

Own Discount Table - This reason code has its own discount rule table. Any changes only apply to this reason code.

4. No Benefits (money's worth)

If this field has been activated, then discounts with this price change reason will not be included for the calculation of the benefits in money's worth.
This only needs to be taken into consideration if you enter how much money/discount your personnel are given in a certain period. Please see Address Management: Personnel – Working time.

5. No Bonus Reduction

If this check box has been activated, then discounts of this price change reason do not reduce the bonus. This only needs to be taken into consideration is you offer commissioning to your personnel.
Example: Bonus 10 %

Sales 100.00
Discount 10.00 (no bonus reduction)
Bonus 10.00

Sales 100.00
Discount 10.00 (with bonus reduction)
Bonus 9.00

6. Discount

Check this field if price changes are to be shown as rebates if they have been assigned this price change reason. This is only used in the area of EDI - SLSPRT (sales report to the supplier).

7. Discount Table: From SP Price

How much must be spent before this price change reason can be used.

Item line level = The individual item line must meet this amount
Total receipt level = The whole receipt must total to this amount. (category filters cannot be applied.)

8. Discount Table: To SP Price

How much must be spent before this price change reason cannot be used for this promotion. This enables you to add different levels to this price change reason code.
For Example:

£100 - £149.99 = 10% off
£150 - £199.99 = 15% off
£200 - £300 = 20% off

Item line level = The individual item line must meet this amount
Total receipt level = The whole receipt must total to this amount. (category filters cannot be applied.)

9. Discount Table: As Amount

How much discount should be applied in a monetary value for the price range in that row? E.g. £5 off

10. Discount Table: In %

How much discount should be applied in a percentage value for the price range in that row? E.g. -5%

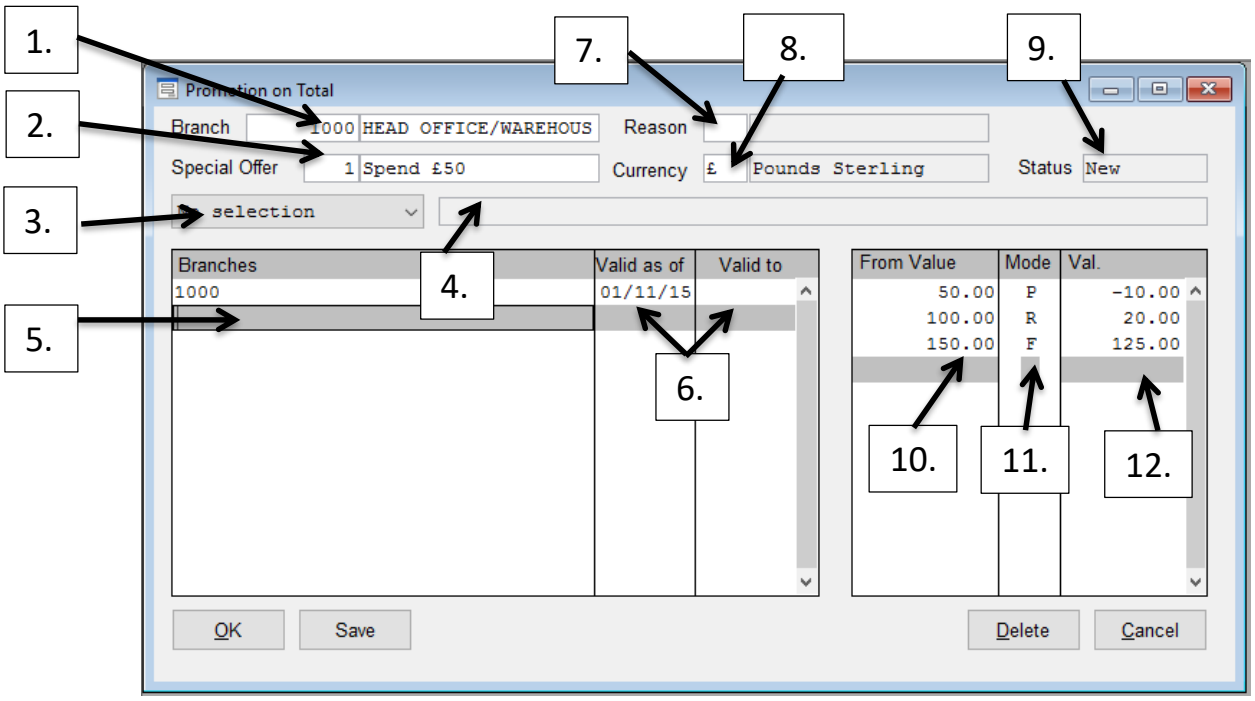
11. Discount Table: Round To

An optional rounding value can be entered into this field that is to be used on the discounted SP price. Please note: this cannot be applied when discounting via a monetary value.

12. Discount Table: Mark Down

Enter the optional mark-down that is to be used on the discounted and (optionally) rounded sales price. Please note: this cannot be applied when discounting via a monetary value.

Quick Reference: Promotion on Total



1. Created by Branch

This is the branch number where the promotion was created. When logged into a branch, it is possible to enter the Head Office branch number and view promotions that have been created by Head Office, and poll down to the store,

2. Promotion number and description

This is the record number that this special offer will be saved as. These records book in order, meaning if you have items that fall in to the criteria of 2 or more rules, the higher numbered rule takes president.
It is important to also use the description field to help identify and find rules when required.

3. Selection dropdown

Enter the category type that you would like to filter the promotion by. Please note: No Selection means that offer will apply to all items
The categories that are available to be used as item selection criteria are;

- Product Group
- Sub Group
- Type
- Origin
- Sales Area
- Supplier
- Statistical Period
- Item Attributes

4. Selection criteria

If a category has been selected in the dropdown, then it is possible to enter a filter in this field. This enables you to only place the promotion across a limited number of items (e.g. spend £50 on candles and get xx% off). Please note if this is left blank, then all items will be valid for this promotion.

5. Valid in branches

Enter the branch range that the offer is to be valid in.

For example: 10,15 = the offer will be valid in branches 10 AND 15 only.
10-15 = the offer will be valid in branches 10 TO 15.

Range Definitions can also be used here.

Multiple lines can be entered with different branches.

6. Date Period Item filter selection

By entering a "from-date" and a "to-date" a validity period can be assigned to each branch filter line. This means that promotion can be applied in different branches on different days.

A blank valid to date means that this is an ongoing offer without a planned ending date.

7. Reason

Enter a reason for discount that applies to the entire promotion. If this is left blank, then the promotion will be recorded in the POS Daily Analysis: Sales Statistics report under the code '0'. These are created in the Price Change Reason screen.

8. Promotion Currency

A promotion price currency is defined here so that this promotion is only valid for those branches in which the promotion currency set here corresponds to the branch's system currency. If this is left blank, then the system currency will be used.

9. Status

There are 3 possible status options for a promotion which the system automatically assigns.

New = This promotion has been newly created today.
Modified = This promotion has had a modification today which is yet to be booked.
Booked = This promotion has been fully booked

10. From Value

Enter the value that the customer must spend across the valid items in one transaction.

11. Mode

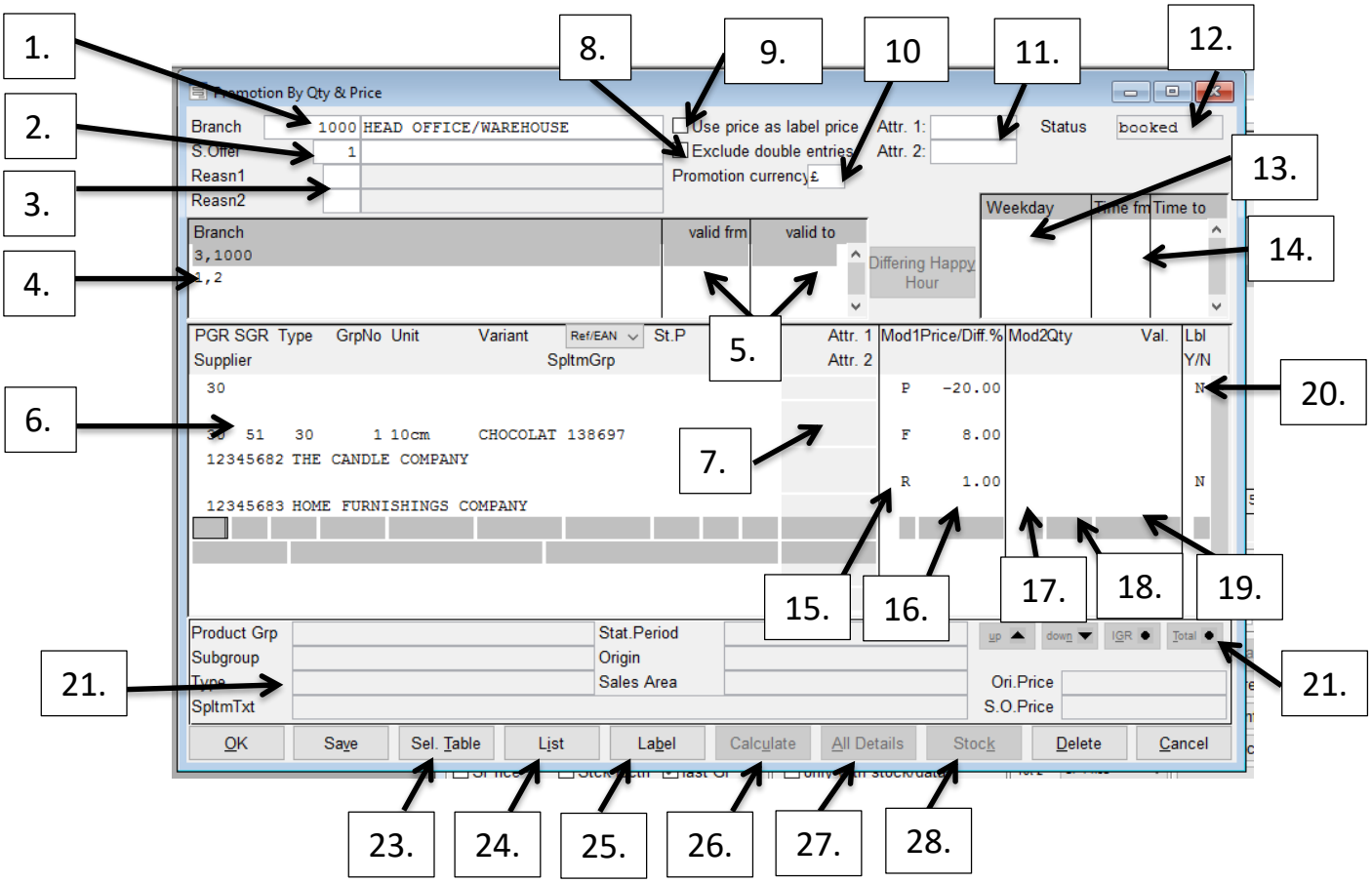
There are 3 different types of discounts that can be created in this area. They all apply to a single unit being scanned.

F : The value will be a new fixed price of an item.
P : The value enter will be the percentage taken off of an item. (Positive value means mark-increase)
R : The value enter will be the amount taken off of an item. (Positive value means mark-down, a negative means a mark-up.)

12. Value

Enter the value that you would like the item to either be sold at, percentage discounted by or amount taken off. This is dependent on which letter has been entered into the Mode field.

Quick Reference: Promotion Qty & Price



1. Created by Branch

This is the branch number where the promotion was created. When logged into a branch, it is possible to enter the Head Office branch number and view promotions that have been created by Head Office, and poll down to the store,

2. Promotion number and description

This is the record number that this special offer will be saved as. These records book in order, meaning if you have items that fall in to the criteria of 2 or more rules, the higher numbered rule takes president.
It is important to also use the description field to help identify and find rules when required.

3. Reason

Enter a reason for discount that applies to the entire promotion. If this is left blank, then the promotion will be recorded in the POS Daily Analysis: Sales Statistics report under the code '0'.
These are created in the Price Change Reason screen.

- Reason 1 = The reason code for promotions set in Mode 1
- Reason 2 = The reason code for promotions set in Mode 2

4. Valid in branches

Enter the branch range that the offer is to be valid in.
For example: 10,15 = the offer will be valid in branches 10 AND 15 only.
10-15 = the offer will be valid in branches 10 TO 15.
Range Definitions can also be used here.
Multiple lines can be entered with different branches.

5. Date Period Item filter selection

By entering a "from-date" and a "to-date" a validity period can be assigned to each branch filter line. This means that promotion can be applied in different branches on different days.
A blank valid to date means that this is an ongoing offer without a planned ending date.

6. Item filter selection

Item filters are entered to define what a customer must buy for this offer to be valid.
This can be as broad as all items with in a PGR or from a certain Supplier, to as specific as a Reference Number. This can enable grouping of items which can avoid the need of multiple combinations being created.

7. Item Attribute Value filters (if activated in the configurator)

If Attributes have been added to the area at the top of the window, then it is possible to enter the value filter that you would like to be valid for this offer in these fields.

8. Exclude double entries

If you do not want to allow double entries within the item selection, then activate this field. This avoids special offers being applied to an item twice. E.g. PGR 100 reduced by 10%, PGR 100 SGR105 reduced by 5%.

9. Use price as label price

If this check box is selected, then the special offer prices resulting from this special offer will be printed onto the labels during the goods in. This requires that the promotion is not a “happy hour” and that the prices have been booked through the system.

10. Promotion Currency

A promotion price currency is defined here so that this promotion is only valid for those branches in which the promotion currency set here corresponds to the branch’s system currency. If this is left blank, then the system currency will be used.

11. Item Attribute (if activated in the configurator)

This is where you can enter an attribute that the promotion can be filtered by. Up to two different attribute can be used per promotion record. Please note, these should be number values and not text value options.

12. Status

There are 3 possible status options for a promotion which the system automatically assigns.

New	= This promotion has been newly created today.
Modified	= This promotion has had a modification today which is yet to be booked.
Booked	= This promotion has been fully booked

13. Weekday / Time frm / time to

Enables the ability to set “happy hour” style promotion where the discount is only applied between specific times during the day.

- Weekday = The days of the week that this promotion will be valid on
- Time Frm = The time the promotion will be valid from during the day.
- Time To =The time the promotion is valid to during the day.

14. Differing Happy Hour

A different ‘happy hour’ can be added to each line entered in the branch filters. This means a ‘happy hour’ can be active in one branch on a Wednesday between 3-4pm, and active in another branch on Thursday between 3-6pm.

15. Mod1

There are 3 different types of discounts that can be created in this area. They all apply to a single unit being scanned.

- F : The value will be a new fixed price of an item.
- P : The value enter will be the percentage taken off of an item. (Positive value means mark-increase)
- R : The value enter will be the amount taken off of an item. (Positive value means mark-down, a negative means a mark-up.)

16. Price / Diff. %

Enter the value that you would like the item to either be sold at, percentage discounted by or amount taken off. This is dependent on which letter has been entered into the Mod 1 field.

17. Mod2

There are 7 possible different types of promotion that can be created in this area. They all apply to a reference number been scanned a certain quantity of times in a single transaction.

- N Unit discount - When 'X' units of an item are sold for 'Y' number of units. E.g. 3 for 2 on a single item. Mix and match is not possible.
- P Percentage discount - When more than 'X' pieces are sold, then all units of that item will be changed by 'Y' percentage.
- % Percentage discount – When more than 'X' pieces of an item are sold, then any pieces above that number for this item will be discounted by 'Y' percentage. Any pieces below that number for that item will still be full price.
- F Fixed price discount – When more than 'X' pieces of an item are sold; then all items will be sold for a fixed price of 'Y' amount.
- W Fixed price discount – When more than 'X' pieces of an item are sold, then any pieces above that number for this item will be sold at a fixed price of 'Y' amount. Any pieces below that number for that item will still be full price.
- A Mark down discount - When more than 'X' pieces are sold, then all units of that item will be reduced by 'Y' amount.
- R Mark down discount - When more than 'X' pieces of an item are sold, then any pieces above that number for this item will be reduced by 'Y' amount. Any pieces below that number for that item will still be full price.

18. Qty

Enter the quantity of items that the customer must buy in one transaction for this offer to be valid. This quantity is only if the same item reference number is scanned. If you would like them to have a variety of items they can choose from, then you need to use the Promotion Mix and Match screen.

19. Val.

And the value amount for this discount.

20. Lbl Y/N

Enter a 'Y' in this field if you wish labels to be printed for the item selected in this line. Warning!! This entry is not saved and must be altered each time.

21. Up / Down / IGR / Total

Up and down	Copy values up or down the table.
IGR	Copy the value, but only from items that share the same group number.
Total	All active values to be the same.

22. Item selection detail

If an item Reference Number is entered and the line highlighted in the filter table, then more detail will be visible in this area on that specific product.

23. Sel. Table

Provides the ability to import item data from other sources such as Product Statistics or Scanner Data.

24. List

Print a list of all items that this promotion applies to either for the whole company or by branch

25. Label

Print a labels of all items that this promotion applies to.

26. Calculate

Find out and adjust the discounted price of an item either by percentage, amount or fixing the price.

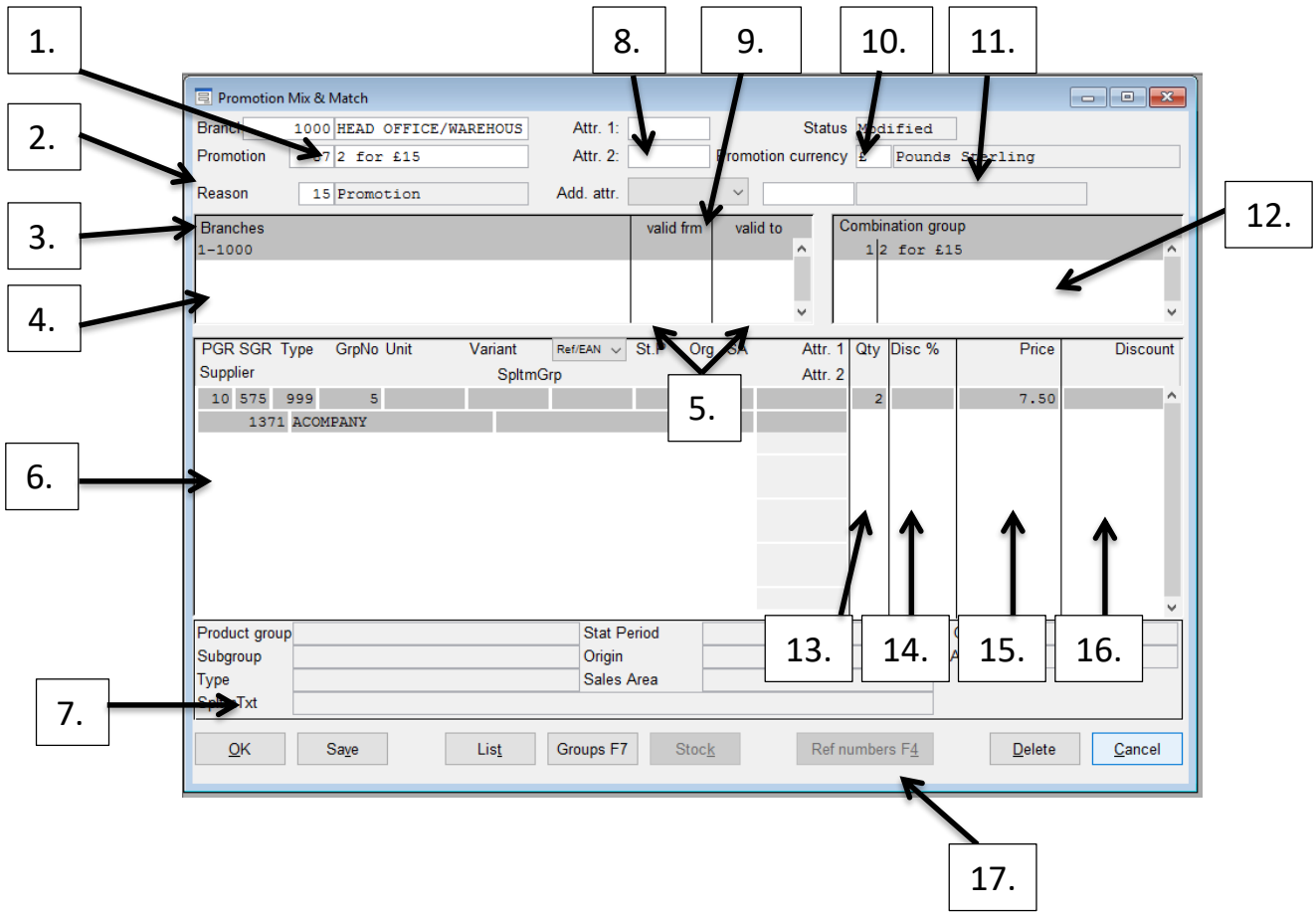
27. All Details

Add all units and variant of a group number to the promotion

28. Stock

Check the stock levels in the company for this item.

Quick Reference: Promotion Mix & Match



1. **Created by Branch**

This is the branch number where the promotion was created. When logged into a branch, it is possible to enter the Head Office branch number and view promotions that have been created by Head Office, and poll down to the store,

2. **Promotion number and description**

This is the record number that this special offer will be saved as. These records book in order, meaning if you have items that fall in to the criteria of 2 or more rules, the higher numbered rule takes president.
It is important to also use the description field to help identify and find rules when required.

3. **Valid in branches**

Enter the branch range that the offer is to be valid in.
For example:

10,15 = the offer will be valid in branches 10 AND 15 only.
10-15 = the offer will be valid in branches 10 TO 15.

Range Definitions can also be used here.
Multiple lines can be entered with different branches.

4. **Reason**

Enter a reason for discount that applies to the entire promotion. If this is left blank, then the promotion will be recorded in the POS Daily Analysis: Sales Statistics report under the code '0'. These are created in the Price Change Reason screen.

5. **Date Period Item filter selection**

By entering a "from-date" and a "to-date" a validity period can be assigned to each branch filter line. This means that promotion can be applied in different branches on different days.
A blank valid to date means that this is an ongoing offer without a planned ending date.

6. **Item filter selection**

Item filters are entered to define what a customer must buy for this offer to be valid.
This can be as broad as all items with in a PGR or from a certain Supplier, to as specific as a Reference Number. This can enable grouping of items which can avoid the need of multiple combinations being created.

7. **Item selection detail**

If an item Reference Number is entered and the line highlighted in the filter table, then more detail will be visible in this area on that specific product.

8. **Item Attribute (If activated in the configurator)**

Up to two item attributes can be added a promotion for the purpose of item filtering.

9. **Address Attribute**

Address attributes can be created which are then attached to certain Customers or Personnel. This attribute can then be attached to this promotion, which means that this offer will only be valid if the address number with this attribute is attached to a transaction. Example of this could be for mail order only customer, VIP, loyalty card customers etc.

10. **Status**

There are 3 possible status options for a promotion which the system automatically assigns.

New	= This promotion has been newly created today.
Modified	= This promotion has had a modification today which is yet to be booked.
Booked	= This promotion has been fully booked

11. **Currency**

A currency can be entered for the purpose of filtering branches when using a multi-country selling database (rather than a mandant). For example, if you select that a promotion should only be for EURO currency, then any branches that do not sell in that currency will be excluded from the promotion.

12. **Combination Groups**

There are occasions that it may be required for combinations of the same offer need to be created. By using the combination groups, you are able to create the separate offers, but by having them in the same screen, also find and control them easier.

13. **Quantity column**

Enter the quantity of items that the customer must buy in one transaction for this offer to be valid. This quantity can be spread across multiple lines. Please note that the total quantity enter/viewable in 1 combination group, is the quantity that the customer must buy before the offer will take effect.

14. **Discount %**

Enter the percentage by which items are to be discounted which corresponds to the definition in these lines.
An entry in this field results in the fields "Price" and "Discount" being emptied as the price change types mutually exclude each other.

15. **Price**

Use this field to show which price should be fixed for items that correspond to the definition in these lines if the linked items special offer definition has been activated.
An entry in this field results in the fields "Discount %" and "Discount" being emptied as these price change types mutually exclude each other.

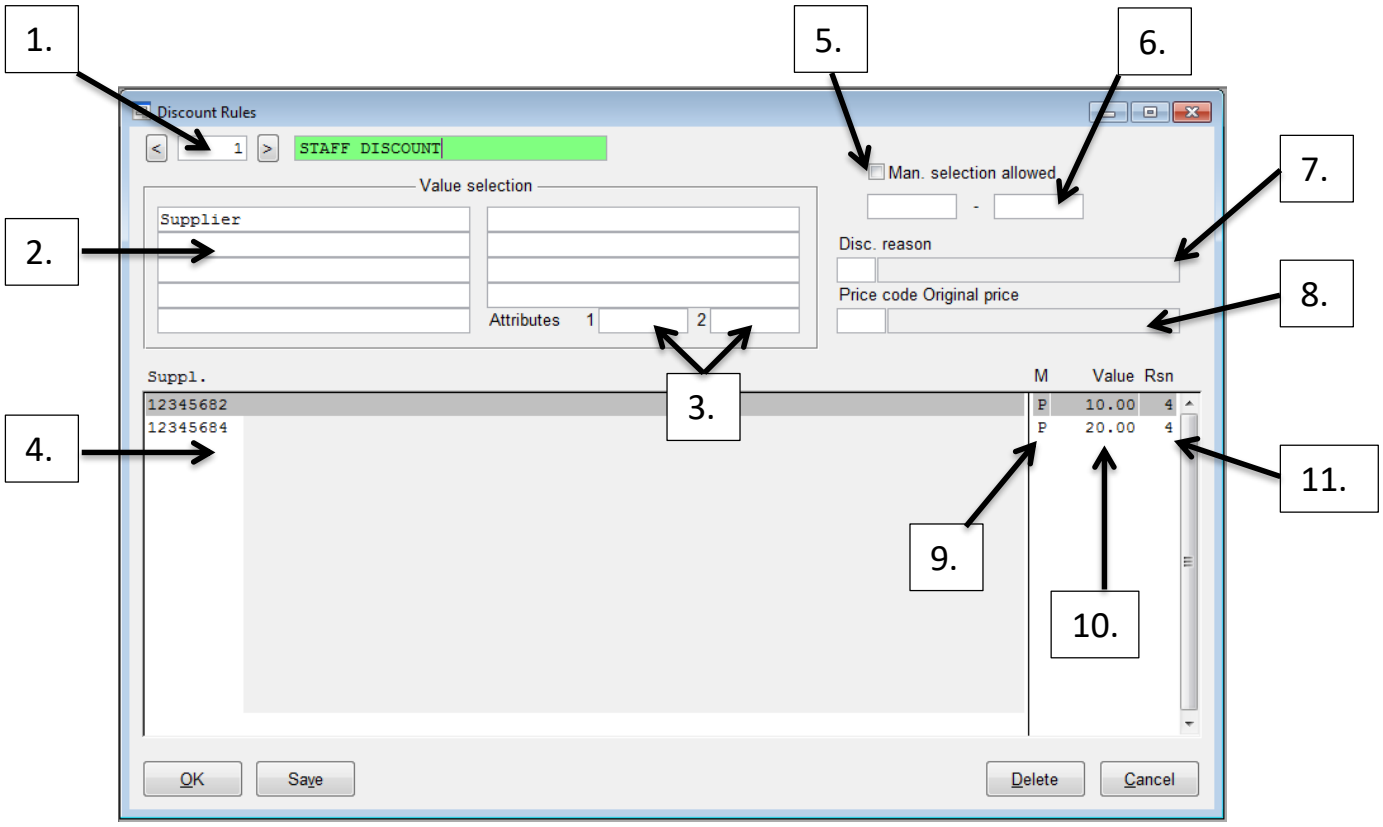
16. Discount

Enter the amount by which the price of an item is to be reduced which corresponds to the definition in these lines when the linked.
An entry in this field results in the fields "Discount %" and "Price" being emptied and these price change types are mutually exclusive.

17. Ref Numbers F4

Enter the amount by which the price of an item is to be reduced which corresponds to the definition in these lines when the linked.

Quick Reference: Discount Rule



1. Discount Rule number and description

This is the record number that this special offer will be saved as. These records book in order, meaning if you have items that fall in to the criteria of 2 or more rules, the higher numbered rule takes president.
It is important to also use the description field to help identify and find rules when required.

2. Value selection

User selects definition levels for which data can be selected and values can be defined for discounts to be granted in the bottom section of the screen.

3. Value selection: Attributes

If the "1-attribute" was used in the "Value selection" pane, an attribute must be entered here for which the corresponding values are selected on the bottom pane.
If "2-attribute" was used in the "Value selection" section, an attribute must be entered here for which the relevant values are then selected in the bottom section.
The attribute should be a number value option attribute that is applied at “style” level (attached in the ItmGrp Data tab.

4. Value criteria entry

As the categories are entered in the value selection fields, the headings appear in this table and the columns are activated. This is where the criteria is entered.

5. Manual selection allowed

Ticked: On the sales mask, a discount rule can also be entered manually.
Manual input requires that the "Manual selection allowed" checkbox is activated and that the "from-to period" is valid.

Unticked: This discount rule can only be used for the assignment in the address reference data for personnel and/or customer addresses.

6. Date Periods

By entering a "from-date" and a "to-date" a validity period can be assigned to each discount rule.
If the validity period has expired, this discount rule cannot be entered manually. See also the "manual selection allowed" checkbox.

The validity period is not relevant for any assignments made for the discount rule in the address reference data.

7. Discount Reasons

Enter a reason for discount that applies to the entire discount rule.
A special reason for discount can be entered for each definition line (see point 11.)

8. Price code original price

Here you can enter a price code with which the reference price is compared.
If the "Price code, original price" field is empty, the price will be compared with the reference price (target branch price).

9. Mode

F : The value will be a new fixed price.
P : The value enter will be the percentage taken off.
R : The value enter will be the amount taken off. (Positive value means mark-down)

If this Mode field is left blank, the Value and Reason fields will be ignored and the system will use the valid (discount) percentages instead. Price increases are not possible.

10. Value

Depending on the setting in the M (mode) field, you can specify
- the new price (if mode = F),
- the change in percent (if mode = P) or
- an absolute mark-down (if mode = M).

Note: If a negative price is entered (if mode=F) or the price is left blank, this will be interpreted internally as a price of 0.00. If a negative percentage is entered (if mode=P), this will not be evaluated. If a negative mark-down is entered (if mode=M), this will not be evaluated.

11. Reason

You can use this field to enter a special reason for discount for each definition line.
If the line-specific "reason for discount" entry is left blank, the above entry for "reason for discount" is applied to the entire discount rule.