

# DRS-POS Discounts Guide

V 5.8

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## About this Document

Oracle Corporation acquired MICROS and its Torex products. All further references to Torex should be considered as Oracle Corporation.

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# 1 HOW TO ACCESS DISCOUNTS

- Log in to DRS as normal

- Select Item Icon



- Select discounts & offers icon on right hand side



The below screen will appear, at this point you can only do 2 things, search for an existing discount or create a new discount.

Discount [input field] [New] [Save] [Cancel] [Delete]

Basic | Details | Qualifications | Reward 1 | Reward 2 | Security

What type of discount is this?

- Item Discount This type of discount is manually given by the user to one selected item
- Sale/Value Discount This type of discount is manually given by the user to a group of items
- Sale/Value Discount Auto This type of discount is automatically given by the POS to a group of items
- Offer This type of discount is automatically given by the POS to a combination of items
- Tender This type of discount will be given when this tender is used on a transaction.

[input field] [input field] [Clear]

Voucher discounts are given for this voucher [input field]

Enter a description for this discount [input field]

Enter a description to appear on the POS receipt [input field]

Enter a priority for this discount. This will be used to determine the order that the system should check the discounts. A lower number indicates higher priority. [input field]

Enter a comment describing what this discount is used for and how it works [input field]

## 2 CREATING NEW DISCOUNT SCHEMES





### 2.1 Basic tab

- Select NEW button from the top toolbar
- The below screen will appear, all yellow coloured cells will turn white to allow the discount scheme to be configured

Field Description	Notes
Item Discount	This would be used if a discount/offer were to be manually applied to specific item by the <b>USER</b>
Sale/Value Discount	This would be used if a discount/offer were to be manually applied to a specific group of items by the <b>USER</b>
Sales/Value Discount Auto	This would be used for the <b>SYSTEM</b> to automatically apply a discount/offer to a group of items using a fixed rate of discount.
Offer	This would be used for the <b>SYSTEM</b> to automatically apply a discount/offer to a combination of items, where there is no fixed discount rate or reward products are given to the customer
Tender	This type of discount/offer will be given when a predetermined tender method is used in a transaction
Tender types	Identify & select those tender methods which are to activate the discount/offer. Select the tender method from the drop down menu and select the button to the right hand side with an arrow on it, this will add the tender type to the box on the right hand side. Additional tender types can be added by repeating the process and will be separated by commas in the "summary" box to the right.
Voucher types	Only one voucher system can be selected at a time, identify the voucher method by selecting from the drop down menu.
Description 1	System & reports description of the discount
Description 2	POS description of discount, this is what will appear on the receipt and on the customer display
Priority	This is the priority this discount will take when it clashes with other existing discounts. If during testing there are multiple discounts running with cross over products then a decision needs to be made

	which one will take priority, the lower the number the higher the priority. The default setting for this is 1
Comment	Free text field to add details of offer and details of any update to it





## 2.2 Details tab

Discount 1675    

New Save Cancel Delete

Basic **Details** Qualifications Reward 1 Reward 2 Security

Enter the locations that can use this discount

Location

A sell price can be one of five levels. Discounts will only be applied to sell prices at this level.

Include Exchange items when checking offer qualifies

Include items on promotion when checking offer qualifies

Enter the date range that this discount can be used.

Enter the time range that this discount can be used. Times are in 24 hour format.

00:00 00:00

What days of the week can this offer be used?

Sunday  Tuesday  Thursday  Saturday

Monday  Wednesday  Friday

What customer type does this discount apply to. Leave empty to apply to any customer.

Field Description	Notes
Location	Add in store or store groups for the discount/offer to be active in.
Date Range	Start & End date of the discount/offer, if left blank this will be effective immediately and will continue to run until and effective end date is entered, by default start & end dates are left blank.
Time Range	Start & End time of the discount/offer. If left at 00.00 to 00.00 the offer will work from start of business to end of business, by default both fields are set to 00.00.
Week Day Range	Select which days of the week you require the offer to run, by default all days are selected.
Customer Type	If left blank, all customers which meet the purchase criteria can access this discount/offer. However, if a certain group of customers can only access the discount (eg Loyalty customers) the customer type must be selected here.
Pricing Level	All sales items have 5 pricing levels, if left blank the discount/offer will apply to all pricing levels, however you can select specific price levels for the discount to apply to.
Include Exchange items when checking offers qualifies	Always leave ticked on by default.
Include items on promotion when checking offer qualities	Always leave ticked on by default.



## 2.3 Qualifications tab

Discount 1675

New Save Cancel Delete

Basic Details **Qualifications** Reward 1 Reward 2 Security

The following groups make up this discount offer. The specified quantity or value of items in each group must be sold before the group passes. All groups must pass before the discount offer can be given.

Group Name	Qualify Type	Min Qty	Max Qty	Value

The highlighted group above consists of the following items. If you do not specify any items then ALL items will be considered part of the group.

Dept	Category	Group	SubGroup	Classification	Family	IPN	Exclude Items
							<input type="checkbox"/>

Copy Reward

**Groups Section** – multiple qualifying groups can be added in here. One is required if the trigger for the discount/offer is something like a pint of beer for £1.50, however if the offer is something like sprit & a mixer for £2, the 2 groups are required the first for the spirit and the second for the mixer.

Field Description	Notes
Group Name	Defaults to ALL ITEMS, but where there are multiple qualifying groups, it's a good idea to rename this to something appropriate eg, SPIRIT or MIXER so when reviewing discount you can easily identify what the discount includes and where to find the products.
Qualify Type	Select whether it is a Quantity or Value qualifier.
Min & Max Quantity	If the discount/offer requires a certain product to be bought then this option needs to be selected. Examples: Shot Tequila – 1 min 1 max BOGOF – 2 min 2 max
Value	If the discount/offer requires a minimum customer spend on specific items (identified below) then this option needs to be selected. Add in the minimum customer spend for the discount/offer to be triggered.

**Items Section** – for each group set up (above section) you need to tell the system which sales items are part of that qualification group, eg, there may be 2 groups one for spirits and another for mixers, each group will need to have qualifying items added. There are a number of ways to link info:

<b>Field Description</b>	<b>Notes</b>
Department	Use this if a whole Department group is to be included in the discount/offer eg food or drink.
Category	Use this is a whole Category is to be included in the discount/offer, eg, Drink/Spirits or Food/Restaurant.
Group	Use this is a whole Group is to be included in the discount/offer, eg, Drink/Spirits/Vodka or Food/Restaurant/Starters.
Sub Group	Use this is a whole Sub Group is to be included in the discount/offer, eg, Drink/Spirits/Vodka/Premium or Food/Restaurant/Starters/Hot.
Classification	Use this if a classification group of items are to be included.
Family	Use this if a family group of items is to be used.
IPN	Use this if specific items are to be included.
Exclude	Use this if a Department, Category, Group, Sub Group, Classification or Family group is to be used but there are certain items linked to these items which need to be excluded from the offer.

**Copy Reward** – if the discount/offer is to use the “Offer” option under the Reward 2 tab then by selecting copy reward all the items in the qualifications/item section will be copied over to the reward cell

## 2.4 Reward 1 tab

Discount 1675 New Save Cancel Delete

Basic Details Qualifications **Reward 1** Reward 2 Security

What type of reward is to be given? More reward options are available on the Rewards 2 tab.

Discount  
All qualifying items will be discounted by this rate, e.g. buy 2 and get 50% discount or buy more than \$100 for a \$20 discount.  
0.00 %

Tender Discount  
All qualifying items will be discounted by a percentage of the tendered amount  
0

Effective Price  
All qualifying items will be discounted to give an overall effective price, e.g. buy any 2 for \$9.95. This type of reward is only available for offers  
Effective Price £0.00

Price Level  
All qualifying items will be discounted to change to this new price level  
WARNING: Only use this with quantity groups not value groups  
1

Voucher  
This voucher will be printed as a reward  
...

Field Description	Notes
Discount	Allows a fixed percentage discount (eg 20%) or a fixed monetary discount (£3) which will be taken off the total of the bill of the qualifying items.
Effective Price	Changes the effective price of the product or product combination, eg, Pint Beer would have a new effective price of £1.50 during the offer period.
Price Level	Changes the prices on qualifying items from the current price level to a different price level.
Tender Discount	Percentage discount to be applied when certain pre-determined tender types are used (identified in the Basic tab). This could be used for percentage discount for customers with customer accounts or customers who pay cash.
Voucher	Instead of providing an actual discount, this option allows a voucher to be printed for future transactions.

## 2.5 Reward 2 tab

The Reward 2 or Offer option can be used for 3 different types of discount set up's, if the discount allows 2 reward then this goes into Other 2, eg buy a foundation and get a lipstick and nail varnish free:

**Scenario 1.** Where sales items are to be applied with a variable discount or RSP, in this scenario the items will be listed with the appropriate discount or selling RSP

**Scenario 2.** Where a maximum number of discounts in a transaction can be applied, in this scenario the number of items to be discounted need to be identified and the order in which the discounts are to be applied identified

**Scenario 3.** Where reward items are to be given to the customers, in this scenario the number of items to be discounted need to be identified, whether the discount is to be applied across all qualification items or just to the reward item and the order in which the discounts are to be applied identified

- How many items will be given as a reward
  - Scenario 1.** Enter in 999 as it doesn't matter how many items are discounted
  - Scenario 2.** Enter in the maximum number of items which can be discounted in the transaction, eg 20% staff discount on up to 4 main items, you would enter 4 in this field
  - Scenario 3.** Enter 1 if you wish to give the customer a reward product
- Which item from the below list should be given first - this option tells the discount/offer in which order to choose items from the list to discount from, the options are:
  - Sequence – if items all have an order of 1, then the system will just pick out the first appropriate discount in the list. If an order of discount to apply the discount has been inserted it will try to apply 1 first, if this is not applicable it will try 2 and so on.
  - Lowest Sell Item – when system goes to apply discount it will apply the discount to the lowest selling item first and then move upwards, eg, by a bottle

of shampoo and conditioner and get one free, the system would automatically reward the customer with the cheaper product of the two.

- Highest Sell Item – exactly the same as above except that the discount will apply to the most expensive product first and then move down the list.
  
- Allocate this discount to all items in the offer
  - Tick this on if the discount is to be spread across all items in the discount scheme
  - Tick off if the discount is to apply to only the item discounted
  
- Order
  - If order in which the discount applies doesn't matter then leave the default 1 in the order box for items
  - If the sequence of items in which the discount applies to the transaction matters then you need to enter that order on to the items, 1 being the most important.

Field Description	Notes
Dept	Use this if a whole Department group is to be included in the discount/offer eg food or drink, items linked to this department must be part of a qualification group otherwise no discount/offer will be applied
Category	Use this if a whole Category is to be included in the discount/offer, eg, Drink/Spirits or Food/Restaurant, items linked to this category must be part of a qualification group otherwise no discount/offer will be applied
Group	Use this if a whole Group is to be included in the discount/offer, eg, Drink/Spirits/Vodka or Food/Restaurant/Starters, items linked to this group must be part of a qualification group otherwise no discount/offer will be applied
Sub Group	Use this if a whole Sub Group is to be included in the discount/offer, eg, Drink/Spirits/Vodka/Premium or Food/Restaurant/Starters/Hot, items linked to this sub group must be part of a qualification group otherwise no discount/offer will be applied
Classification	Use this if a classification group of items are to be included, items linked to this classification must be part of a qualification group otherwise no discount/offer will be applied
Family	Use this if a family group if items is to be used, items linked to this family must be part of a qualification group otherwise no discount/offer will be applied
IPN	Use this if specific items are to be included, items with this IPN must be part of a qualification group otherwise no discount/offer will be applied
Reward Type	Whether it is a fixed rate of discount "Discount" or a fixed selling price "Sell Price"
Disc Rate	If a discount then what is the rate of discount
Disc Type	Enter here whether it is a % discount or a monetary discount (\$)

Sell Price

Enter the new effective RSP of the product

## 2.6 Security tab

The screenshot shows a software interface for managing discounts. At the top, there is a 'Discount' label and a yellow input field containing the value '1675'. To the right of this field are four circular icons: a globe, a green checkmark, a red 'X', and a red 'X' with a blue 'X' over it. Below these icons are the labels 'New', 'Save', 'Cancel', and 'Delete'. A horizontal tab bar below the icons contains five tabs: 'Basic', 'Details', 'Qualifications', 'Reward 1', 'Reward 2', and 'Security'. The 'Security' tab is currently selected. Below the tabs, a text instruction reads: 'Only users in these groups will be able to manually select the discounts'. Underneath this instruction are five circular icons: a globe, a document with a checkmark, a red 'X', a left arrow, and a right arrow. Below the icons is a 'Security Group' label and a yellow input field. The main area of the interface is a large blue rectangle.

If the security field is left blank, then all users can access the discount. If you only want a Manager to be able to view & use the discount then you need to add Manager into the security group and no one without a Manager or higher security access will be able to use the discount.

### 3 HOW TO SEARCH EXISTING DISCOUNTS

From the top toolbar select the discounts search button



A search parameter box will appear (shown right)

Discount Search  
Edit Settings Help  
Code  
Description  
Effective Between  
 Current Only  
Search  
Cancel  
Clear

If you know the correct code for the discount/offer then type it into the top "Code" box and select Search. If the code is correct then it will pop up into a screen under it, shown right, you can either double click on the offer or select once and then click on Select in the bottom right hand corner

Discount Search  
Edit Settings Help  
Code  
Description  
Effective Between  
 Current Only  
Code Description Effective Expiry Location  
1289 TESTDISCOUNT 09/01/2006  
1 Records  
Print Filter  
Select

If you do not know the code but want to search on a partial description, eg "TEST" is part of the description, you need to enter %TEST into the Description box and click on Search:

Discount Search  
Edit Settings Help  
Code  
Description  
Effective Between  
 Current Only  
Code Description Effective Expiry Location  
38 TEST 10/01/2005 28/01/2005  
1289 TESTDISCOUNT 09/01/2006  
1675 TEST EXAMPLE DISCOUNT  
3 Records  
Print Filter  
Select

At the bottom of the screen there is a button called "Filter", by selecting this it means you can go into any record and scroll through the list without having to go back to the search page, it also means that when you have run a search and gone into a record to review it your search parameters are saved.

## 4 HINTS & TIPS FOR WHEN THINGS GO WRONG

If a site reports that a discount is not triggering here's the things you should check:

1. Has the site reloaded their tills to update it with the updated information? The time & date of the last till reload can be checked in till control, if they have, go to the next step
2. Is the site expecting the same products to activate during the same days/times/customer type as on the discount request received? If not, ask the site if they want to amend the discount scheme time/date restrictions, if they are correct, go to the next step
3. Next, you need to go back to the discount/offer scheme and check the following things:
  - Offer type is selected correctly (sometimes this can change if not saved correctly)
  - Site is in location field
  - Correct dates have been inserted
  - Correct times have been selected
  - Correct days of the week have been selected
  - Correct customer type has been selected
  - Correct price level has been selected
  - Correct qualification groups & items have been created
  - Correct reward scheme info has been selected (sometime this can change if not saved correctly)
  - Check security settings are as requested
4. If all of the above is correct, then you need to load the site's database onto your test kit and check that another discount/offer is not clashing. If you've got to this point with no issues then 99.99% of the time it will be a priority clash. Find the other discount(s) and set the priorities as requested by the site. This can be done by running a discount summary report to see which discount offers are running or searching through all discounts to see which one is linked to the site and clashing.
5. If it is still not working then there is probably something fundamentally wrong with the discount, this is fairly rare, but has been know to happen in "clusters". The best way to resolve this is to set up the discount again and deactivate the original version.