

Product	Grocery Manager
Version	Version 4.8
Title	12048 – Discount Configuration
Client Question	How are discounts setup in Grocery Manager?
Issue Summary	Discount Configuration

Grocery Manager includes a module for *Discount Configuration*. This feature enables users to create and manage up to 3 different *Discount* configurations for WinPOS registers and 2 different *Discount* configurations for DOSPOS registers.

Discounts need to be setup in 4 different places within the Grocery Manager system. These areas are:

1. **Discount Configuration**
2. **Department Maintenance**
3. **POS Configuration**
4. **Item Maintenance**

Discount Configuration

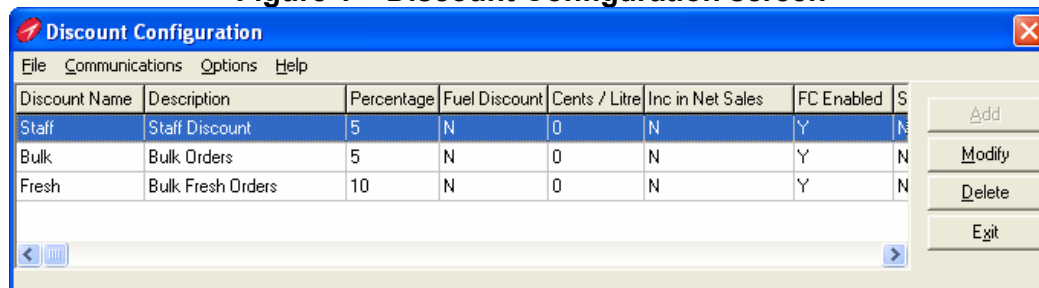
To create a Discount complete the following:

Select the following to enter *Discount Configuration*:

- **Start Grocery Manager, or return to the top-level menu**
- **POSTBOS**
- **3. Utilities**
- **6. Discount Configuration**

You are presented with the *Discount Configuration* screen (see Figure 1).

Figure 1 – Discount Configuration screen





Note

Prior to completing any amendments to the *Discount Configuration* items the configuration currently in use at the registers must be read back to Grocery Manager.

Reading Back Current Discount Configuration

To read back the current *Discount Configuration* select **Communications** and **Read** from the top menu bar of the *Discount Configuration* screen.

When the confirm message is displayed select **Yes** to proceed with the *Read* or **No** to return to the *Discount Configuration* screen.

Once read back the *Discount Configuration* screen will be refreshed to display any changes that may reflect a difference in data currently at the registers.

Adding a Discount

To Add a *Discount*, click on the **Add** button to display the *Edit discount settings* screen (see Figure 2).

Figure 2 – Edit Discount Settings screen

Edit discount settings

Name

Description

Discount Percent

Fuel Discount

☐ Enable discount on fuel

Cents per litre discount

☐ Add to Net Sales (inc disc) total

☐ Enabled for Frequent Customers

☐ Enable Discount Reference Number Scanning

OK Cancel

Enter the appropriate information required to the following fields:

- **Name** – The name of the *Discount* which will appear on the button at the register.
- **Description** – A description of the *Discount*.
- **Discount Percentage** – The rate of *Discount* given (reflected as a percentage)



The **Fuel Discount** section of the *Edit discount settings* screen allows *Discounts* to be applied to Fuel purchases. Place a tick in this checkbox to enable Discounts on Fuel purchases.

The **Cents per Litre Discount** field allows *Discount* to be entered as a cent value.

Once completed press *OK* to save changes or *Cancel* to return to the *Discount Configuration* screen without saving any changes.

Modifying an existing Discount

To modify an existing *Discount* entry, highlight the entry and press the **Modify** button on the *Discount Configuration* screen.

The *Edit Discount* screen is displayed and the fields are populated with the current settings of the *Discount* entry.

Modify as required and select *OK* to save changes or *Cancel* to return to the *Discount Configuration* screen without saving any changes.

Delete an existing Discount

To delete an existing *Discount* entry, highlight the entry required and press the **Delete** button on the *Discount Configuration* screen.

Select *Yes* when the **Confirm Delete** prompt is displayed or *No* to return to the *Discount Configuration* screen.

Department Maintenance

Department Maintenance allows *Discounts* to be assigned to departments in Grocery Manager.

Discounts can be enabled for the default discount specified, an alternate discount value or alternatively disabled.

To amend these settings select:

- **Start Grocery Manager, or return to the top-level menu**
- **8. Operations and Maintenance**
- **3. Department Maintenance**
- **2. Department Maintenance**

The *Department Maintenance* screen is displayed (see Figure 3).



Figure 3 – Department Maintenance screen

Dept	Dept Name	Fuel	Default GP	GL Pur	GL Sales	GL Sls Var	Sect
0	test	N					
1	Grocery	N					
2	Fruit & Vegetables	N					999
3	Variety	N					
4	Del	N					
5	Meat	Y					
6	Bakery	N					
7	Cosmetics	N					

To set / change the *Discount* settings, highlight the required *Department* entry and select the *Discounts* tab by single clicking on it.

You are presented with the *Discount* tab (see Figure 4).

Figure 4 – Department Maintenance screen (Discount Tab)

Dept	Dept Name	Fuel	Default GP	GL Pur	GL Sales	GL Sls Var	Sect
0	test	N					
1	Grocery	N					
2	Fruit & Vegetables	N					999
3	Variety	N					
4	Del	N					
5	Meat	Y					
6	Bakery	N					
7	Cosmetics	N					

Note

Discount settings start from left to right.

Discount 1 is the left hand entry, Discount 2 the middle and Discount 3 the right hand entry.

Options available that can be set in the *Discount* tab of *Department Maintenance* are:

- **Default** – This option allows the default percentage set up in Discount Configuration to be used for this department.
- **Specified** – Allows a percentage to be inserted and used, this figure overrides any percentages inserted in Discount Configuration.
- **Disabled** - No discount is applied to this department regardless of what is inserted in Discount Configuration.

When all changes/additions have been completed select *OK* to save changes or *Exit* to return to the *Department Maintenance* menu without saving changes.



Note

When the *Discount* settings are changed in *Department Maintenance* both a **Department Download** and **Initial PLU Download** need to be completed for the changes to take effect at the registers.
See *Completing a Department Download and Initial PLU Download* for information on how to complete.

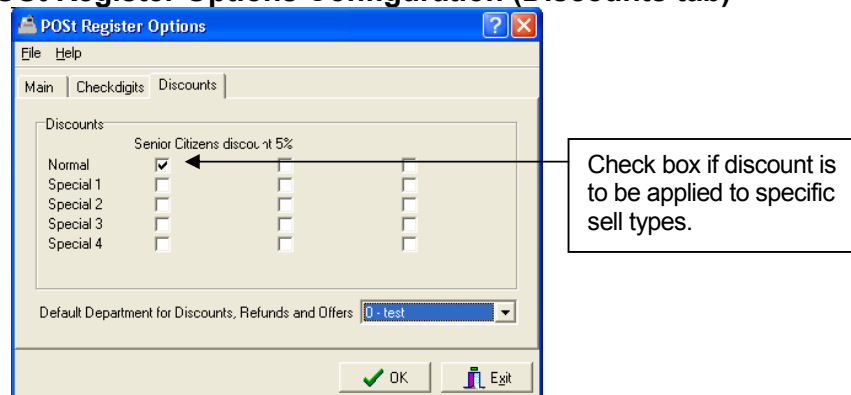
POS Configuration

POS Configuration allows *Discounts* to be configured for specific **Sell Types**. To configure these complete the following:

- **Start Grocery Manager, or return to the top-level menu**
- **3. POS Communications**
- **7. POS Configuration**
- **1. POS Configuration**

Select the *Discounts* tab – as displayed in Figure 5.

Figure 5 – POST Register Options Configuration (Discounts tab)



To enable specific sell types for a particular discount type place a tick in the corresponding check box.

Place a default department for reporting Discounts, Refunds and Offers which is the department displayed first on any reports.

Tip

The headings of the Discount types have now reverted from discount 1, 2 or 3 to the description entered in *POST Configuration*.

Item Maintenance

Item Maintenance allows specific PLU's to be assigned a particular *Discount* type. To enable a specific discount type to a PLU complete the following:

- **Start Grocery Manager, or return to the top-level menu**
- **1. Item Maintenance**



Select the PLU required by using the search fields and double click on selected PLU to display.

The *Item Maintenance* screen is displayed. Select the *Flags* tab (located between the Sell and WinPOSt tabs) by single clicking on it to bring to the front (see Figure 5).

Figure 5 – Item Maintenance (Flags Tab)

The screenshot shows the 'Item Maintenance' window with the 'Flags' tab selected. The 'Discounts' section has checkboxes for 1, 2, and 3, all of which are checked. Callout boxes indicate that the 'Flags' tab should be clicked to bring it to the front, and that a tick should be placed next to the appropriate discount entry(s).

To enable a specific *Discount* for a PLU enter a tick in the appropriate checkbox (Discount 1, 2 or 3).

Press *OK* to save changes or *Exit* to return to the Grocery Manager main menu.

Note

After changing the *Discount* settings an **Initial PLU Download** is required (see section *Completing a Department Download and Initial File Load*).

Note

For more information on filtering and searching in Item Maintenance please refer to datasheet **10824-Item Maintenance Filtering** and **10825-Resize** (and re-order search fields)

Completing a Department Download and Initial PLU Download

Department Download

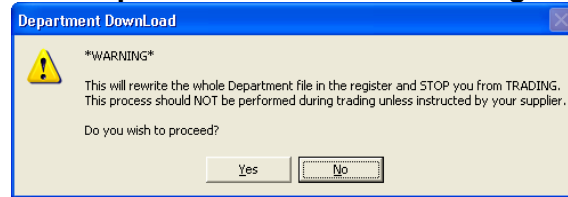
To complete a **Department Download** in Grocery Manager complete the following:

- **Start Grocery Manager, or return to the top-level menu**
- **3. POS Communications**
- **7. POS Configuration**
- **3. Department Download**

A warning message is displayed (see Figure 6). Select *Yes* to proceed with the download or *No* to return to the *POS Configuration* Menu.



Figure 6 – Department Download Warning Message



Note

Department Downloads must be performed outside of trading hours and all registers must be turned on and at the logon screen.

Note

Once a **Department Download** has been performed the registers must be restarted. Once restarted a *Discount* button will be displayed to denote the new *Discount* type.

Initial PLU Download

To complete an **Initial PLU Download** complete the following:

- **Start Grocery Manager, or return to the top-level menu**
- **3. POS Communications**
- **7. POS Configuration**
- **2. Initial PLU Download**

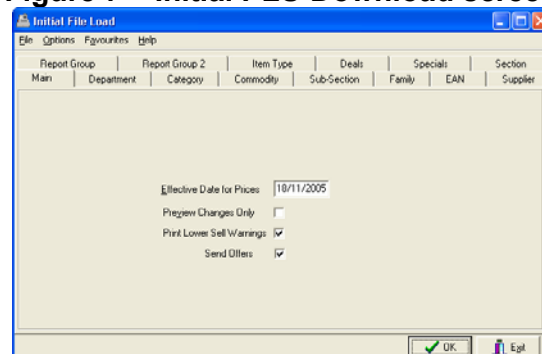
Figure 7 is displayed, if you are performing a full PLU download check that the effective date is today's date and press *OK* to continue or *Exit* to return to the *POS Configuration* menu.

If you wish to perform a selective (Initial PLU) download, use the criteria tabs to select the required configuration. When complete press *OK* to continue or *Exit* to return to the *POS Configuration* menu

Note

A selective PLU (Initial PLU) download **is not recommended** at this time, if it is selected there may be errors with *Discount* processing at the POS due to incomplete data.

Figure 7 – Initial PLU Download screen

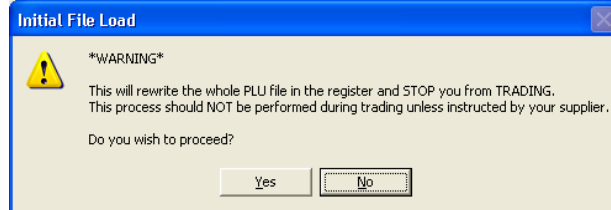




Press *OK* to continue or *Exit* to return to the *POS Configuration* menu.

Press *Yes* to continue when the warning message is displayed, or *No* to cancel and return to the *POS Configuration* menu (see Figure 8).

Figure 8 – Initial File Load Warning Message



Note

Initial PLU Downloads must be performed outside of trading hours and all registers must be turned on and at the logon screen.



Example

Add a Senior Citizens Discount of 5%

1. Discount Configuration

Step No	Field Name / Task	Action
1.	Select the Add button	Select to bring up Edit Discount Setting screen
2.	Name	Enter name of discount that will appear on button at register i.e. Senior's Discount
3.	Description	Discount description i.e. Senior's Discount 5%
4.	Discount Percentage	Percentage amount for discount i.e. 5
6.	Enable Discount of Fuel	Check box for Yes , blank for No
7.	Enabled for Frequent Customers	Check to make discount only available to members of FC.
8.	Enable Discount Reference Number Scanning	Leave unchecked.

Select *OK* to save additions or *Cancel* to return to the *POSTBOS Utilities* menu.

2. Department Maintenance

Step No	Field Name / Task	Action
1.	Select department(s) required for senior's discount	Ensure that Discount field for discount 1 is set to Default
2.	Select all department(s) that senior's discount is not to be applied	Ensure that Discount field for discount 1 is set to Disabled (i.e. Tobacco)
3.	Select any department(s) that may have a different discount level applied	Ensure that Discount field for discount 1 is set to Specified – enter overriding discount percentage

Select *OK* to save changes or *Cancel* to return to the *Operations and Maintenance Utilities* menu.



3. Pos Configuration

Step No	Field Name / Task	Action
1.	Select discounts tab	Click once to bring to front
2.	Select which sell types are applicable to each discount	Place check in each box if applicable to all sell types under Seniors Discount heading. i.e. to exclude all specials place a tick in Normal only
3.	Default department for discounts, refunds and offers	Select default department for reporting purposes. i.e. Grocery

Select *OK* to save changes or *Cancel* to return to the POS Configuration menu.

An information only message is displayed stating that an Initial PLU Download is required after close of business for changes to take effect. Press *OK* to continue.

4. Item Maintenance

Step No	Field Name / Task	Action
1.	Select PLU required to be configured for discount	Search and double click on selected PLU
2.	Select Flag tab located between Sell and WinPOST	Click once to bring to front
3.	Configure discount parameter	Enter a tick in Discount 1 check box if this PLU is to be included in seniors discount.

Note

The amendment to specific PLU's in *Item Maintenance* is only required should *Discounts* settings be applied to PLU level. If *Discounts* are only applied at department level only, this step is not required.

5. Department Download and Initial PLU Download

Step No	Field Name / Task	Action
1.	Select Department Download	Select Yes to continue download or No to cancel
2.	Select Initial PLU Download	Press Yes to continue download, Yes to confirm download or No to exit