



System Discounts Guide

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System Discounts Overview

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

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

Dashboard

Pricebook

Inventory

Reports

Queue

Maintenance

Loyalty

Schedules

Pricebook

Item Details | Mass Updates | Pricing Exceptions | Buydowns | System Discounts | Vendor Parts | Vendor Part Kits | Commissions | Uplifts | Inactive Items

Name	Start	Stop	Amount	Qty	Receipt Text	Priority	On Schedule		
MARLBORO LOY...	7/1/2018 12:01:00 AM	12/31/2018 11:59:00	0.5000	2	MARLBORO LOY...	1	<input type="checkbox"/>	Up	Down
MARLBORO BUS...	7/1/2018 12:01:00 AM	12/31/2018 11:59:00	0.2500	2	SAVE \$.25 PER P...	2	<input type="checkbox"/>	Up	Down
MARLBORO MU...	7/1/2018 12:01:00 AM	12/31/2018 11:59:00	0.0500	2	SAVE \$.05 PER P...	3	<input type="checkbox"/>	Up	Down
HAPPY HOUR B	7/1/2018 12:01:00 AM	12/31/2018 11:59:00	10.0000	6	HAPPY HOURS!	4	<input type="checkbox"/>	Up	Down
FREE LIGHTER ...	7/1/2018 12:01:00 AM	12/31/2018 11:59:00	100.0000	1		5	<input type="checkbox"/>	Up	Down
R&J CIGAR PRO	7/1/2018 12:01:00 AM	12/31/2018 11:59:00	75.0000	10		6	<input type="checkbox"/>	Up	Down
BUY 2 GET 1 FR	7/1/2018 12:01:00 AM	12/31/2018 11:59:00	1.0000	2		7	<input type="checkbox"/>	Up	Down

Discount Details

Discount Name: Discount Type:

Item Filter Type:

Start Date: Stop Date:

Receipt Text:

Buy: Get Free: Use Trigger List Inventory Clearance

Priority: Occurrence Limit Per Sale: Require Loyalty Customer Daily Limit:

Use Schedule Is Altria Discount Apply Tax

1 - FasTrax Store #1
 2 - FasTrax Store #2

[Check All](#) [Clear](#)
[Check By Zone](#)
 [Check](#)

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Archived Discounts

[View Trigger Items In Discount](#)
[View Items In Discount](#)

1 Stores Selected To Receive Changes/For Reporting
Corporate Mode 1 Messages [Settings](#)



Creating a System Discount

1. In Director, choose the "Pricebook" module



2. Then, choose the "System Discounts" tab

System Discounts

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

Other methods:

\$ Off Each Item – when the quantity is met, a dollar amount is removed from each item

% Off Each Item – when the quantity is met, a percentage is remove from each item

X Items For y Dollars – when the quantity is met, each item is reduced to equal a set amount (2 for \$1, 3 for \$5, etc)

Buy x Get y % off – when the buy quantity is met, gives a percent discount off a specified number of items

3. Choose the "Add" button



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

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

The screenshot shows the 'Discount Details' form with the following fields and callouts:

- 1: Discount Name (BUY 2 GET 1 FREE)
- 2: Discount Type (Buy x Get y Free)
- 3: Store selection (1 - FasTrax Store #1, 2 - FasTrax Store #2)
- 4: Item Filter Type (Items)
- 5: Start Date (1/2018)
- 6: Stop Date (1/2018)
- 7: Receipt Text
- 8: Buy (quantity)
- 9: Get Free (quantity)
- 10: Use Trigger List (checkbox)
- 11: Inventory Clearance (checkbox)
- 12: Priority
- 13: Occurrence Limit Per Sale
- 14: Require Loyalty (checkbox)
- 15: Customer Daily Limit
- 16: Use Schedule (checkbox)
- 17: Is Atria Discount (checkbox)
- 18: Apply Tax (checkbox)
- 19: Archived Discounts button

Additional controls include 'Check All', 'Check By Zone', 'PRICEBOOK ZONE #0', and 'Check' buttons.



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

Choose “Save” when complete



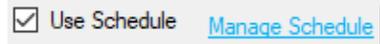
You can view what items are in what discounts, as well as trigger items by choosing the appropriate hyperlink: “View Trigger Items In Discount” or “View Items In Discount”



Managing Discounts Schedule

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

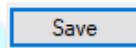
1. With a discount selected, click the "Use Schedule" box to put a check in the box and reveal the "Manage Schedule" hyperlink



2. Choose the "Manage Schedule" hyperlink to bring up the "Choose Availability" window

Day	From	To
<input type="checkbox"/> Sunday	12:00:00 AM	12:00:00 AM
<input type="checkbox"/> Monday	12:00:00 AM	12:00:00 AM
<input type="checkbox"/> Tuesday	12:00:00 AM	12:00:00 AM
<input type="checkbox"/> Wednesday	12:00:00 AM	12:00:00 AM
<input type="checkbox"/> Thursday	12:00:00 AM	12:00:00 AM
<input type="checkbox"/> Friday	12:00:00 AM	12:00:00 AM
<input type="checkbox"/> Saturday	12:00:00 AM	12:00:00 AM

3. Check the boxes for the days and adjust times for each day to your need, and then choose save



4. Finally, choose the "Save" button on the discount itself





Applying Items to System Discounts in Item Details

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



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

The screenshot shows the 'Pricebook' interface with the 'Item Details' tab selected. The 'Manage Discounts' link is highlighted in a red box. The interface includes a sidebar with navigation icons for Dashboard, Pricebook, Inventory, Reports, Maintenance, Loyalty, and Schedules. The main content area displays item details for 'WINSTON 85 BX RED (FF) FSC' with various pricing and vendor information.

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

The screenshot shows the 'Discounts Item Is In' window. It contains two tables: 'Discounted In Discounts' and 'Trigger In Discounts'. The 'Discounted In Discounts' table has columns for Name, Start, Stop, Amount, Qty, and Points. The 'Trigger In Discounts' table has columns for Name, Start, Stop, and Amount. Red numbered callouts (1-8) indicate the steps for adding an item to a discount: 1. Remove From Discount, 2. Add To Discount, 3. each item, 4. Value, 5. Remove From Discount, 6. Add As Trigger, 7. per \$ off each item, 8. Close.



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

Choose “Save” when complete



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

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



Applying Items to System Discounts in Mass Updates

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



Mass Updates

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

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

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

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



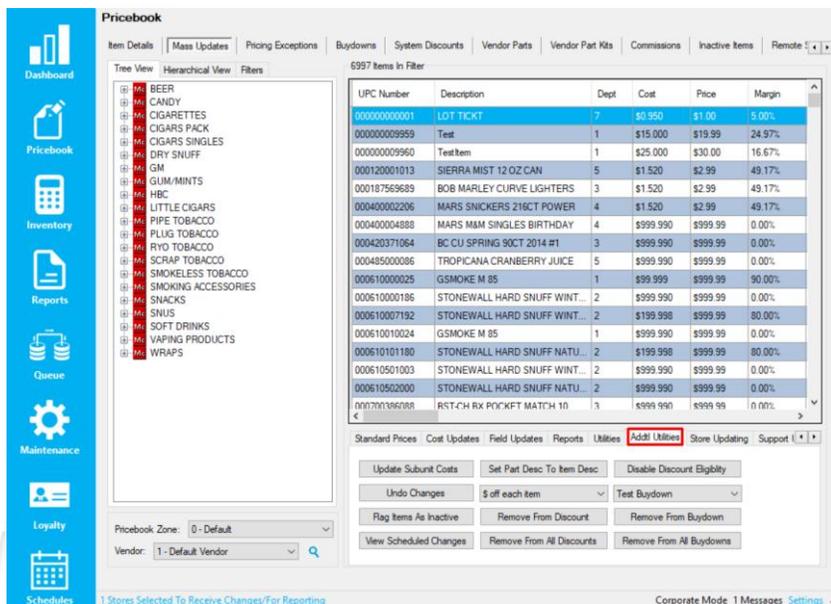
Removing Items from System Discounts in Mass Updates

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



Mass Updates

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



Fast

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

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

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



Flagging Items as Ineligible for System Discounts

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



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

The screenshot shows the 'Pricebook' module interface. The 'Eligible for Discounts' checkbox is checked and highlighted with a red box. The interface includes a sidebar with navigation icons for Dashboard, Pricebook, Inventory, Reports, Queue, Maintenance, Loyalty, and Schedules. The main content area is divided into several sections: 'Quick Find', 'General Information', 'Pricing Information', 'Link Information', 'Vendor Part Information', 'Tree Information', 'Other Information', and 'Recent Sales History'. The 'Eligible for Discounts' checkbox is located in the 'Buydown(s)' section under 'General Information'.

For assistance with configurations, please contact Technical Support at Support@FasTraxPOS.com