

## 5.0 Discount Maintenance

In this section we will discuss setting up discounts, which will include:

- The Discount Maintenance Screen
- Explanations of:
  - Charge Percentage
  - Combo Amount
  - Combo Percentage
  - Discount Amount
  - Discount Percentage
  - Gratuity
  - Open Amount
  - Open Gratuity
  - Open Percentage
- Combo List
- Matching with menu items, categories, or departments
- Assigned and Available Items
- Discount Departments
- Deleting Discounts

The screenshot displays the Discount Maintenance screen with the following elements:

- Discount Form:** Fields for Name, Type, Amount, Access Level, and Category (set to Discount).
- Buttons:** Save, Delete, Exit, and Combo List.
- Days Selection:** Coupon Not Available on Checked Days. Checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.
- Options:** Deduct Sales Tax (checked), Allow only 1 Per Seat (unchecked).
- Transaction Limits:** Maximum Amount Allowed Per Transaction (0.00), Items Needed to Match Per Transaction (0). Applies to assigned only (discount type % only) (unchecked).
- Match With:** Checkboxes for Menu Items, Category, and Departments.
- Discount Department:** Dropdown menu.
- Discount Search Number:** Text field with "None" entered.
- Modifiers:** Checkboxes for "Modifiers are not included".
- Assigned and Available Items:** Two empty tables at the bottom.

### Discount Maintenance Screen

The easiest way to explain Discount Maintenance is to give you a complete description of the various options on the Discount Maintenance screen. This chapter of the manual will take you through all of the options, followed by detailed examples of coupons and other discounts. MicroSale's discount

system will cover every type of discount you might have at your restaurant.

To **add a new** discount, touch the *Name* box at the top of the screen and this will put a cursor in the box. Type the name of the discount. The name should be the same or near the same name as the promotion. This will make it easier for your employees to select the correct discount. After typing in the name you want, touch the *Type* box directly below the Name. Use the arrow key to scroll through the types of discounts and select the one you want. They are as follows:

- *Charge Percentage*- This charges a percentage of the total. For example, a delivery charge.
- *Combo Amount*- This type allows a discount placed when a combination of menu items are purchased. This must be used with Combo list that will be explained later in this section. This is an automatic deduction when the criteria are met.
- *Combo Percentage*- This type allows a discount percentage same as above.
- *Discount Amount*- This type lets you discount one specific dollar amount and is good for most general coupons, e.g., Cheeseburger Combo \$3.49 (discount amount \$.50).
- *Discount Percentage*- This type lets you discount a specific percentage on a check, e.g., Senior Discount (discount percentage 10%).
- *Gratuity*- This is a charge as a percentage of the ticket. This is used when a gratuity is automatically charged. For example, for parties of 8 or more an 18% gratuity will be added.
- *Open Amount*- This type of discount leaves it completely up to the user to decide the amount of the discount. It is suggested that the Access Level (discussed later in this chapter) be set to management level on open discounts.
- *Open Gratuity*- Lets the cashier put in the amount of gratuity to be added to the check total.
- *Open Percentage*- This type of discount leaves it completely up to the user to enter a percentage amount from 1% up to 100%. As with the Open Amount type listed above, this should also be set to management access level.

After you have the type of discount you want, choose an amount. Touch the *Amount* box directly below the Type box. This will move the cursor down to that box. Type the amount or the percentage that you want to be discounted for that particular discount button. If the Type of discount is an open discount or an open percentage, leave this box blank. If the Type of discount is a discount percentage, enter number without the percentage symbol, e.g., a Senior Discount (10%) would be entered as "10". For a dollar amount, be sure to use a decimal point.

When you have finished entering the amount, touch the *Access Level* box. Use the arrow key to scroll through the Access Levels and choose the one that applies to the discount you are entering. It is suggested that you set all of your common coupons and discounts at the lowest level in order to let your employees access them. The larger discount, e.g., employee meals (50%), manager meals (100%), etc., and all of your open discounts should be set to management levels.

Now that the first section of the screen is finished, it is time to move on to the first set of options. The first box on the left side of this section is the *Deduct Sales Tax* box. If the total amount of sales tax is to be charged, do not check this option. If this option is checked, the discount amount and the sales tax will be discounted. The second box is the *Allow only 1 Per Seat* box on the right side of this section. If you only want the discount to be used on one seat (or one tray for a Quick Serve applications) touch the box. If the customer is allowed to have more than one discount per order, do not

check the box.

After you have finished the first set of options, move down to the second set of options directly below the first set. The first option in the second section is the *Maximum Amount Allowed Per Transaction* box. This option allows you to insert a maximum dollar amount for that coupon. For example, if you distributed a coupon that read: “Buy one lunch and get the second one free (Up to a \$4.00 value)”, you could set the maximum amount at \$4.00. This way if the lunch of lesser cost is more than \$4.00, MicroSale will only discount the \$4.00 maximum.

The next option to choose from is the *Items Needed to Match Per Transaction* box. This option allows you to set up the discount so that the user must select a specific menu item or items to apply the discount to. In the following example, the coupon is 2-3 Piece Fish dinners for \$6.99. The discount amount deducted from regular price is \$2.59. 2-3pc. Fish dinners must be purchased in order to receive the discount. So items needed to match per transaction must be 2 and the *Match With Menu Items* must be checked.

Highlight the 3 pc. Dinner under available items and it will appear in the assigned box.

## Combo List

The *Combo List* button is used when the *Combo Amount* or *Combo Percentage Type* is selected. Name the Discount, In this example, I will name it Combo. Under *Type* selected *Combo Amount* because the discount is \$1.00.



Remember to touch the **Save** button after the discount is setup.

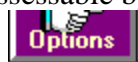
Tbl: Here		1004	Seat # 1	
1	Fish Sandwich			2.29
1	French Fries			1.09
1	Medium Drink			1.09
	Coke			
1	Combo			-1.00
Tax (0.31)		Pre Tax		3.47
<b>Check Total</b>				<b>3.78</b>

In this example, when a fish sandwich, french fries and a medium drink is ordered a \$1.00 discount will automatically be deducted.

The next option *Applies to assigned only (discount type % only)* is only used for discounts that require a search for qualifying menu items. Check this box when setting up a percentage discount that only applies to specific menu items, categories, or departments. When the discount is applied, MicroSale will filter through the items on the check and only discount the items that are in the assigned list. For example, when setting up an Employee discount that applies to food but not liquor, check this box and check *Match with Departments*. Then assign Food from the available Departments to the assigned list. When this discount is applied, only menu items from the Food Department will be discounted even if there are also Liquor items on the check.

On the right side of the Discount Maintenance screen is a box to assign each discount to a Department. The *Discount Department* **MUST** be selected on every discount if this feature is used; otherwise, do not assign any Discount Departments. If this is assigned, it will deduct the discount amounts from the Net Sales for each Department. Otherwise, the Net Sales of each Department will appear to be inflated by the discount amounts. This feature **MUST** be used if you are balancing your reports using the Department Sales totals.

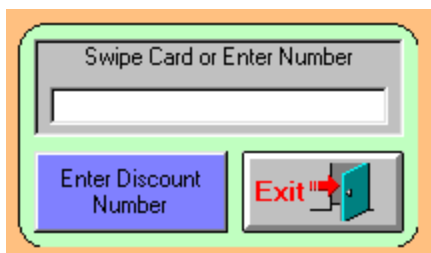
The Discount Search Number is used when a special discount is available but is not accessed through the Discount screen on the order screen. A number will be assigned to the special discount and will be assessable by selecting the Options Button



Located at the bottom of the order screen.

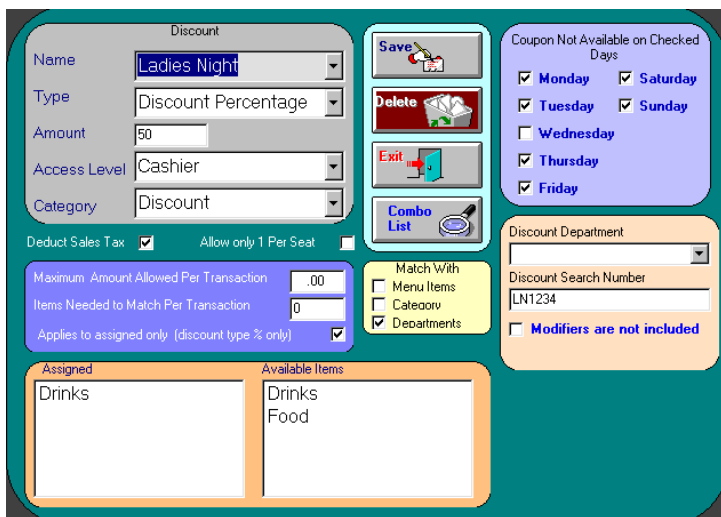


Then select Discount Look Up.



If a card was issued, the Discount Search Number can be swiped or scanned, or the number can be entered in the box with the on screen keyboard.

For Example, A bar may issue a card for Ladies Night that is every Wednesday and drinks are 50 % off. The following is the setup. Notice, that all the Days are checked except Wednesday, Apply to Assigned only is checked, Drinks are assigned, and the Discount Search Number is applied. When an order is taken on Wednesday, and a woman has a card for Ladies Night see will receive a 50% discount on her drinks.



Tbl: Here 1004 Seat # 1		
1	6 in Sub Turkey Sul	4.59
	White Bread	
1	6 in Sub Roast Bee	4.59
	White Bread	
1	Sloe Gin Fiz	4.00
1	Ladies Night	-2.00

As

you can see, the drink was discounted 50% but the food was not.

To delete a discount, go to the *Name* box and use the arrow key to scroll through the list of discounts and highlight the discount to be deleted. This will display that discount. Touch the *Delete* button on the right side of the screen.

**Important:** Remember to *SAVE* before exiting

**Important:** Once you exit to the Managers Menu screen, touch the *Refresh* button to bring the new discount into effect.

## Examples

### **Senior Discount 10%**

Name: Senior Discount  
Type: Discount Percentage  
Amount: 10  
Access Level: Cashier  
Deduct Sales Tax: Yes

### **Senior Discount 10% Only on Lunch and Dinner Entrees**

Name: Senior Discount  
Type: Discount Percentage  
Amount: 10  
Access Level: Cashier  
Deduct Sales Tax: Yes  
Items Needed to Match: 1  
Match with Categories: Yes  
Categories Picked: Dinners, Lunches

### **Manager Meal 100%**

Name: Manager Meal  
Type: Discount Percentage  
Amount: 100  
Access Level: Management  
Deduct Sales Tax: Yes



**Regular Price \$4.79**

Name: 3Pc. Fish 3.99

Type: Discount Amount

Amount: .80

Access Level: Cashier

Match With : Menu Item

3pc Dinner Assigned

Deduct Sales Tax: Yes



**Buy one dinner, get one for half price**

Name: Half Off Dinner

Type: Discount Percentage

Amount: 50

Access Level: Cashier

Deduct Sales Tax: Yes

Items Needed to Match: 2

Match with Categories: Yes

Category Picked: Dinner