



Visual Retail Plus User Guide: Promotions Admin Module

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Introduction

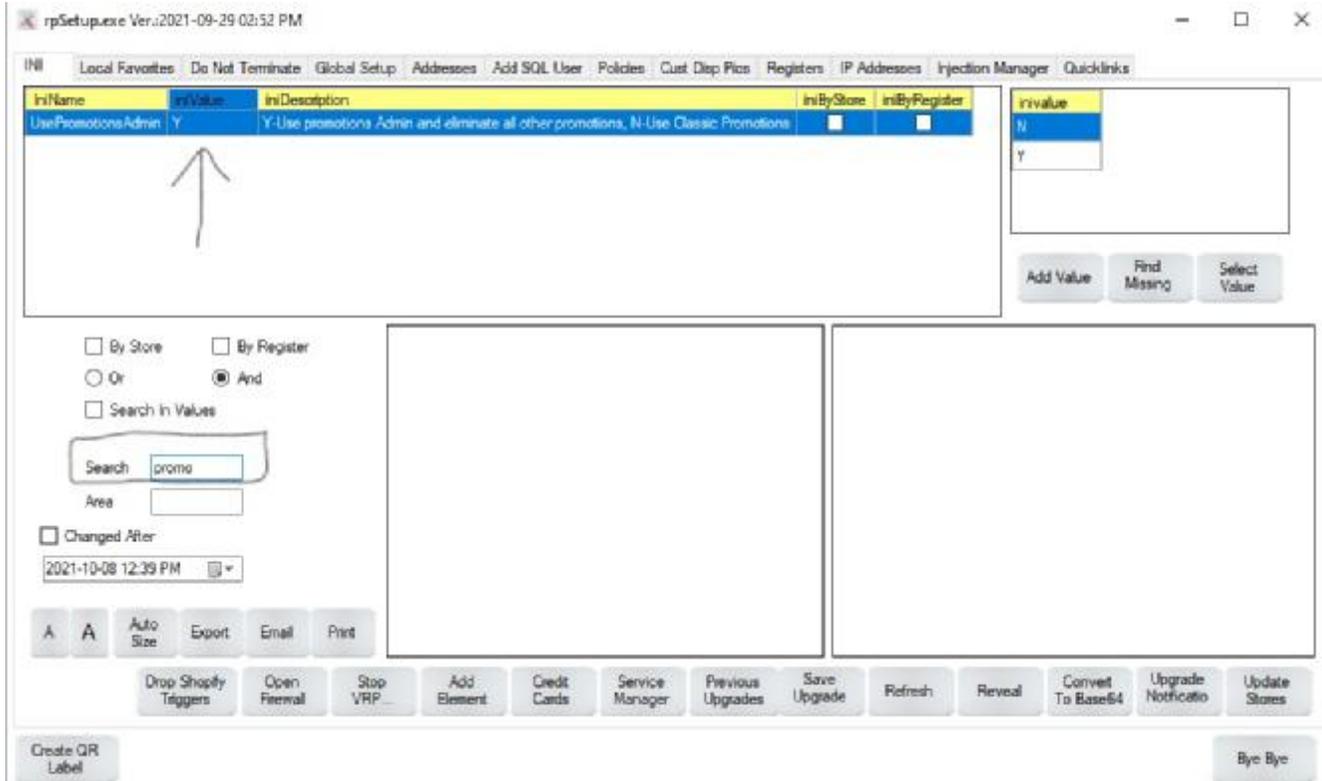
The Promotions Admin Module provides one all-inclusive interface to create, modify, and remove promotions and discounts. The types of promotions included in this module are as follows: Bogo, MixAndMatch, Quantity Discount, Total Receipt Discount, Trip (Total Receipt Item Promotion), Bracketed Discount, Bag, Injection, Discount Table, Bundle, Criteria-Based Discount. This user guide will review the functionalities of each of these promotions in detail. Please see the Table of Contents if you would like to skip to the section on a specific promotion.

Before using Promotions Admin Module

In order to use The Promotions Admin Module the first step is to enable it via the Setup Module.



Next, type “promo” into the search bar and the “UsePromotionsAdmin” Ini will display. Change the Inivalue from N to Y to enable the Promotions Admin Module.



To access the Promotions Admin Module, select the Discounts Module under Utilities.



Next, in the Discounts Module, at the bottom of the screen, select “Promotions Setup” to open the Promotions Admin Module.

rpDisc.exe Ver.:2021-09-23 04:53 PM

Vendor
 Product
 UPC
 MG
 SG
 SSG
 PU1
 PU2
 PU3
 PU4
 Customer

OnSaleT	Type	OnSaleID	OnSaleMethod	OnSaleFigure	FromDate	ToDate	StoreId	Note
P	Product	CLOROX WIPES	Percent	15.00	2020-04-15 00:00	2099-01-01 00:00	All	Clorox Wipes
P	Product	TEST	Percent	10.00	2020-04-15 00:00	2099-01-01 00:00	01	This is a product ...
P	Product	ASUS LAPTOP	Percent	25.00	2020-04-20 00:00	2021-04-20 00:00	01	This is a laptop
U	UPC	10000001	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	CLOROX WIPES...
U	UPC	10000002	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	CLOROX WIPES...
U	UPC	10000003	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	CLOROX WIPES...
U	UPC	10000004	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	T-SHIRT Color:B...
U	UPC	10000005	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	T-SHIRT Color:B...
U	UPC	10000006	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	T-SHIRT Color:B...
U	UPC	10000007	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	T-SHIRT Color:B...
U	UPC	10000008	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	T-SHIRT Color:N...
U	UPC	10000009	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	T-SHIRT Color:N...
U	UPC	10000011	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	T-SHIRT Color:N...
U	UPC	10000012	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color: Blue...
U	UPC	10000013	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color: Blue...
U	UPC	10000014	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color: Blue...
U	UPC	10000015	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color: Blue...
U	UPC	10000016	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color: Yell...
U	UPC	10000017	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color: Yell...
U	UPC	10000018	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color: Yell...
U	UPC	10000019	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color: Yell...
U	UPC	10000020	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color:Red ...
U	UPC	10000021	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color:Red ...
U	UPC	10000022	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color:Red ...
U	UPC	10000023	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	TEST Color:Red ...
U	UPC	10000024	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000025	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000026	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000027	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000028	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000029	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000031	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000032	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000033	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000035	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000036	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000038	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	BOATGOLD Colo...
U	UPC	10000054	Percent	10.00	2020-06-17 00:00	2030-06-17 00:00	All	ASUS LAPTOP ...

Search

Refresh

Discount By
LRD

All Customers

Exclude Line

By Brackets

Add /
Remove By

Import

Promotions
Setup

A

A

Auto
Size

Export

Email

Print

Split

Update

Add

Edit

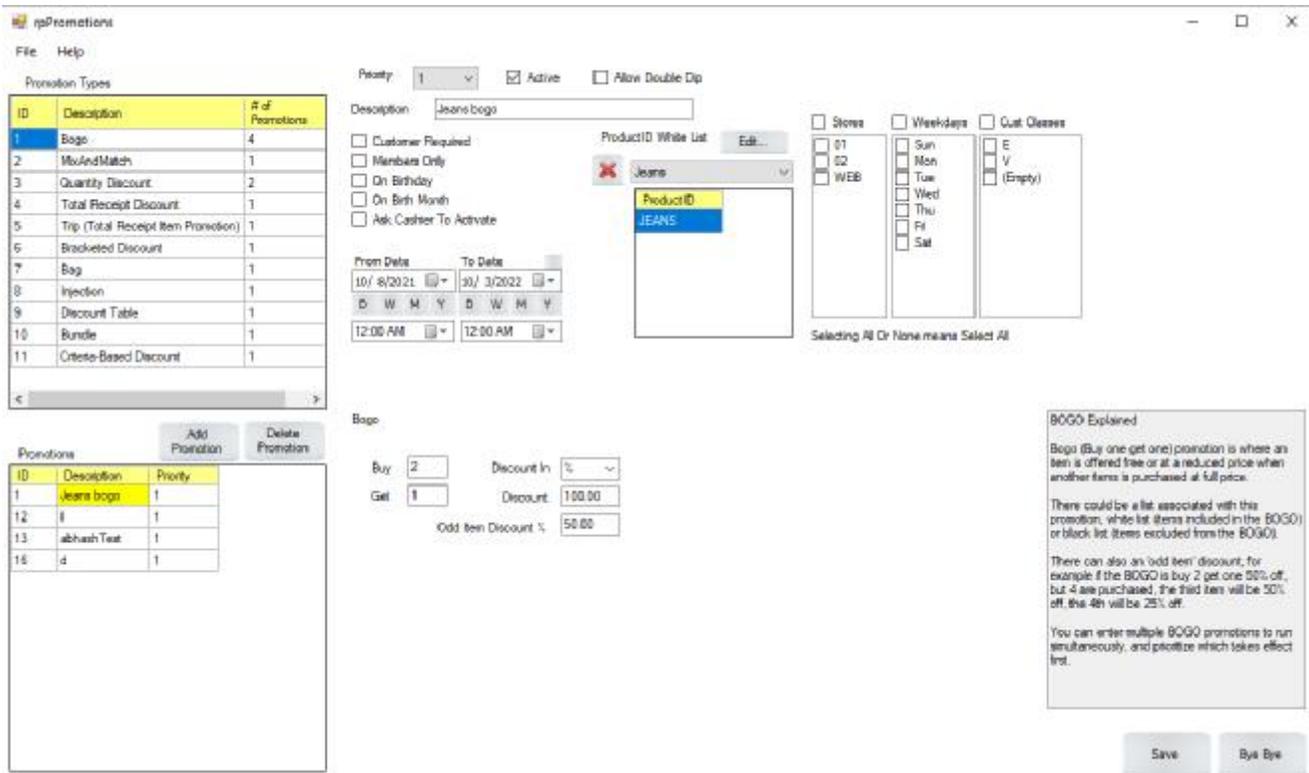
Del Selected
Lines

Promotion
Analysis

Bye Bye

Overview

Below is the screen for the Promotions Admin Module



The top-left lists the various Promotion Types available, by selecting a Promotion Type, the bottom-left of the screen changes to display the Promotions that have been created for that particular type. To add a new promotion, select the appropriate Promotion Type and click the Add Promotion button. A pop-up will appear asking you to create a name for your promotion. Afterwards, you can customize your promotion. Use the priority drop-down to indicate the priority level for your current promotion. If two promotions apply to the same product, then only the promotion with the higher priority (indicated by the lower number) will apply to the sale. For example, if one promotion has a priority level of 1 and another promotion has a priority level of 5, then only the promotion of priority level 1 will apply to the sale.

If you would like to apply multiple promotions to the same item, select the “Allow Double Dip” checkbox for each promotion you would like to apply. Note that this does not add multiple discounts together, but rather applies them

sequentially. For example, if there are two 5% discounts for a \$100 product, then the discount will not be 10% off (\$10), but instead 5% off the \$100 (\$5), then 5% off the \$95 (\$4.75) for a \$9.75 discount. Please note, that when using the Double Dip feature, if both promotions are set to the same priority then the system will apply them in a random order. A \$50 product with a \$20 discount and a 50% discount could be sold for either \$15 or \$5!

Selecting the “Customer Required” checkbox ensures that a customer account must be tied to a sale in order to use the relevant promotion. The “Members Only” checkbox ensures that this customer must also be a member. The “On Birthday” checkbox ensures that it must be both the month and day of the customer's birth to receive the discount. The “On Birthday Month” checkbox ensures that it must be only the customer's birth month to receive the discount. The “Ask Cashier to Activate” checkbox ensures that the cashier must select the discount button in the POS and manually activate the discount in order to apply it to the sale.

The From Date and To Date selectors allow you to decide when and how long the promotion will be available. The Stores option on the right allows you to select if the promotion will be available in all stores or select stores only. The Weekdays option allows you to select if the promotion will be available on particular days or every day. The Customer Classes option allows you to choose if the promotion will only apply to particular customers (for example, only customers who are also employees or only customers who are veterans).

The options at the top of the screen that have been discussed so far will be the same even when changing the type of promotion, however the bottom of the screen where there are various fields such as “Buy” and “Get” as well as the gray “BOGO Explained” box on the right, will change depending on the type of promotion that has been selected. The bottom-right box will explain the currently selected promotion and the options available for it.

The list drop-down between the Date selectors and Stores option allows you to choose which list of items to which the promotion will apply. The next section will cover how to create and edit lists in The Promotions Admin Module.

Lists

In order to access the List Menu, select File then Lists from the drop-down that appears.

The screenshot displays the 'rpPromotions' application window. On the left, a 'File' menu is open, showing the 'Lists' option. Below the menu is a table of promotion types:

	# of Promotions
bogo	4
MixAndMatch	1
Quantity Discount	2
Total Receipt Discount	1
Trip (Total Receipt Item Promotion)	1
Bracketed Discount	1
Bag	1
Injection	1
Discount Table	1
Bundle	1
Criteria-Based Discount	1

At the bottom left, a 'Promotions' table shows the current list:

ID	Description	Priority
1	Jeans bogo	1
12	ll	1
13	abhastTest	1
16	d	1

The main configuration area for the 'Jeans bogo' promotion includes:

- Priority: 1, Active: checked, Allow Double Dip: unchecked
- Description: Jeans bogo
- Customer Required: unchecked, Members Only: unchecked, On Birthday: unchecked, On Birth Month: unchecked, Ask Cashier To Activate: unchecked
- From Date: 20/ 8/2021, To Date: 10/ 3/2022
- Time: 12:00 AM to 12:00 AM
- ProductID White List: Edit... button, list containing 'JEANS'
- Stores: 01, 02, WEB (all unchecked)
- Weekdays: Sun, Mon, Tue, Wed, Thu, Fri, Sat (all unchecked)
- Cart Classes: E, V, (Empty) (all unchecked)

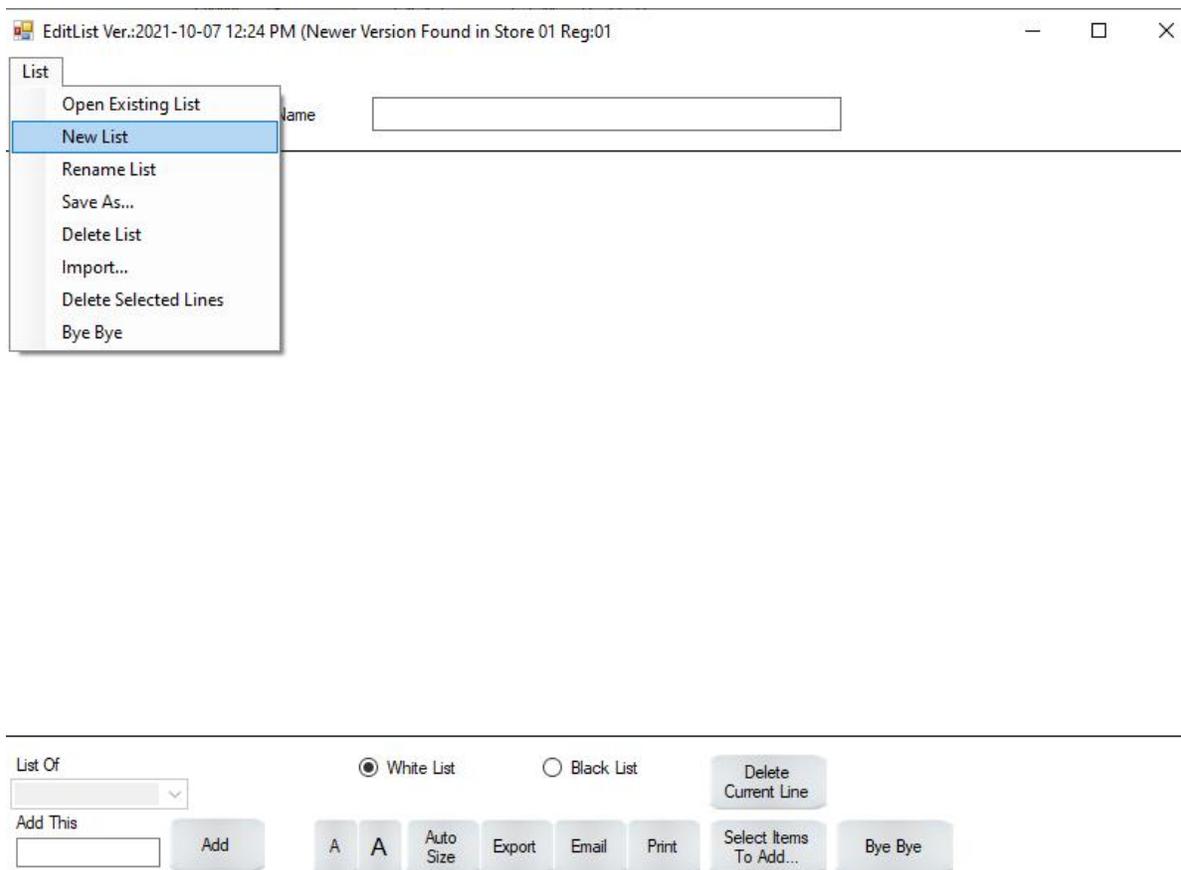
Below the configuration area, the 'Bogo' settings are:

- Buy: 2, Discount In: %
- Get: 1, Discount: 100.00
- Old Item Discount %: 50.00

A 'BOGO Explained' text box provides details: 'Bogo (Buy one get one) promotion is where an item is offered free or at a reduced price when another item is purchased at full price. There could be a list associated with this promotion, white list (items included in the BOGO) or black list (items excluded from the BOGO). There can also an 'old item' discount, for example if the BOGO is buy 2 get one 50% off, but 4 are purchased, the third item will be 50% off, the 4th will be 25% off. You can enter multiple BOGO promotions to run simultaneously, and prioritize which takes effect first.'

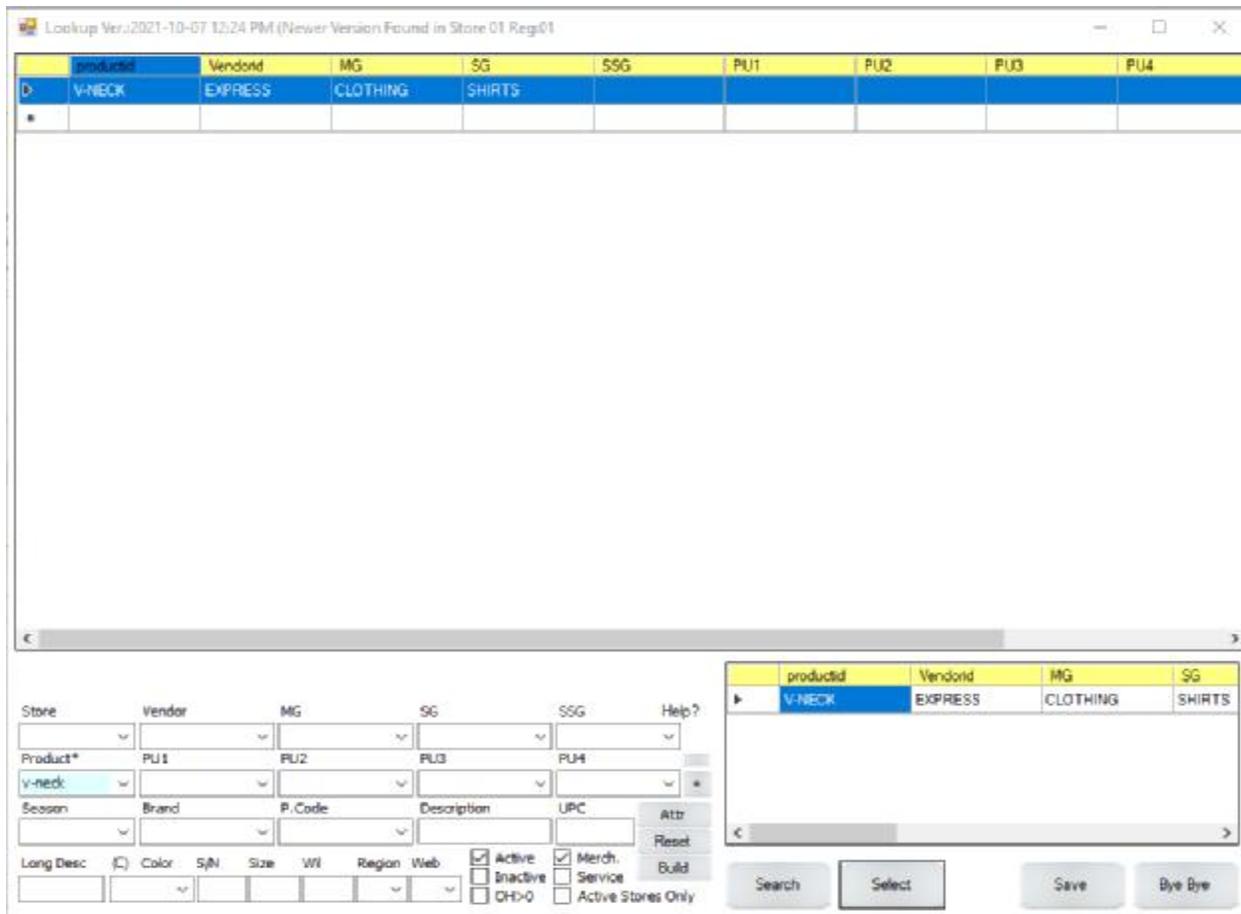
Buttons for 'Save' and 'Bye Bye' are located at the bottom right.

The List Menu allows you to create and save new lists, open, edit, or delete an existing list, add or remove items from an existing list, and even import a new list directly from a spreadsheet. These options are displayed in the figure below.



To create a new list, select the “New List” option from the List drop-down as pictured in the figure above. This will open a new window, which will ask you for the name of the list as well as what category the list contains. Lists can be based on VendorID, ProductID, UPC, or many other distinguishing criteria. Lastly, you will need to select whether the list is a White List or a Black List. If a White List is applied to a promotion, then that promotion will ONLY apply to all items on that White List. In contrast, if a Black List is applied to a promotion, then that promotion will apply to all items in the entire store EXCEPT those on the Black List. This can always be changed at a later time.

Once you have successfully created a list, you will see the List Name at the top of your screen. To add items to the list, select the “Select Items to Add...” button at the bottom of the screen. In the new window that appears, search for the appropriate items you wish to add to your list, then click the select button to add them to the empty box in the bottom-right of the screen. Once that is done click save to successfully add the item(s) to your list.



Bogo

A Bogo promotion offers an item free or at a reduced price when 1 or more other items are purchased at full price. In the bottom-center of the screen, in the “Buy” field, select how many items a customer must purchase in order to receive the Bogo discount. In the “Get” field, enter how many items the customer will get at discount. The “Discount In” field allows you to select whether the Discount will be a percentage or a flat dollar amount. The “Discount” field allows you to enter the amount being discounted. Finally, the Odd Item Discount % allows you to offer a discount on any additional items purchased after the bogo. In the example below, if a customer purchases 2 pairs of jeans, then the 3rd will be free. If they buy a 4th pair, then it will be 50% off due to the Odd Item Discount %. Any additional jeans purchased in this same transaction after the 4th will also receive the 50% discount.

Promotion Types

ID	Description	# of Promotions
1	Bogo	4
2	MixAndMatch	1
3	Quantity Discount	2
4	Total Receipt Discount	1
5	Trip (Total Receipt Item Promotion)	1
6	Bracketed Discount	1
7	Bag	1
8	Injection	1
9	Discount Table	1
10	Bundle	1
11	Criteria-Based Discount	1

Promotions

ID	Description	Priority
1	Jeans bogo	1
12	ll	1
13	abhaahTest	1
15	id	1

Description: Jeans bogo

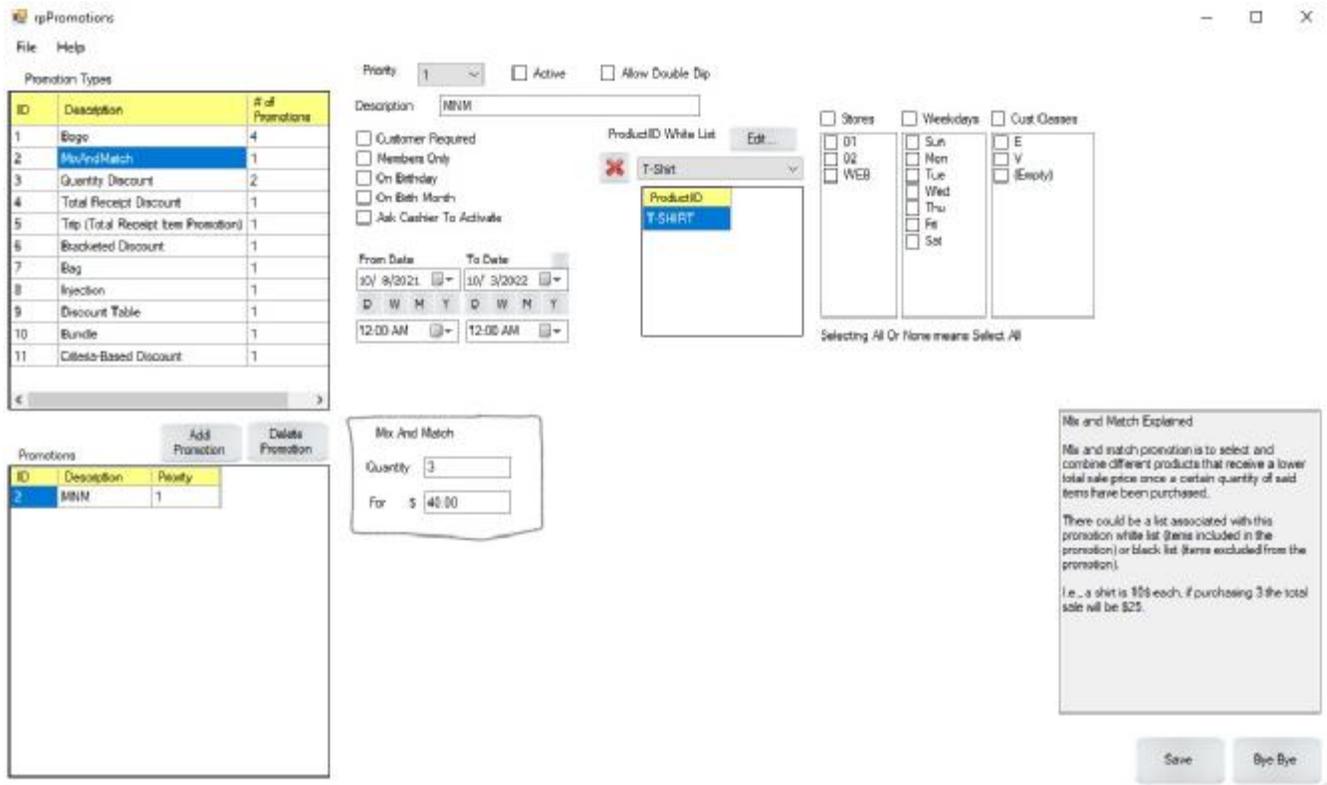
ProductID White List: JEANS

Bogo Configuration:
 Buy: 2, Get: 1, Discount: 100.00, Old Item Discount: 50.00

BOGO Explained:
 Bogo (Buy one get one) promotion is where an item is offered free or at a reduced price when another item is purchased at full price.
 There could be a list associated with this promotion, white list (items included in the BOGO) or black list (items excluded from the BOGO).
 There can also an 'odd item' discount, for example if the BOGO is buy 2 get one 50% off, but 4 are purchased, the third item will be 50% off, the 4th will be 25% off.
 You can enter multiple BOGO promotions to run simultaneously, and prioritize which takes effect first.

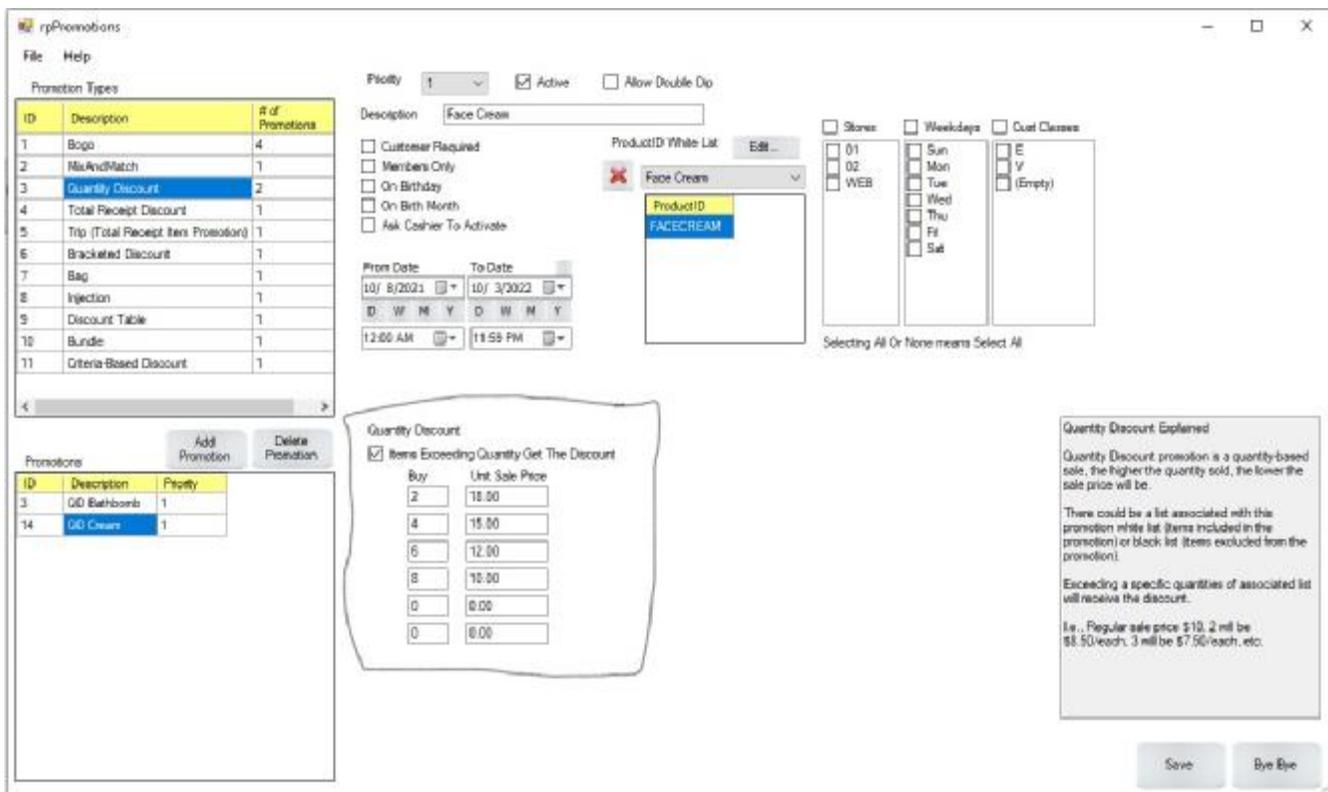
MixAndMatch

A MixAndMatch promotion allows the combination of different products to receive a lower total sale price after purchasing a set quantity. For instance, as in the figure below, the purchase of 3 T-Shirts (that are normally \$15 each), will be sold for \$40 under the MixAndMatch promotion. Simply enter the quantity required for the discount in the “Quantity” field at the bottom-center of the page, then enter the new total sale price for those items.



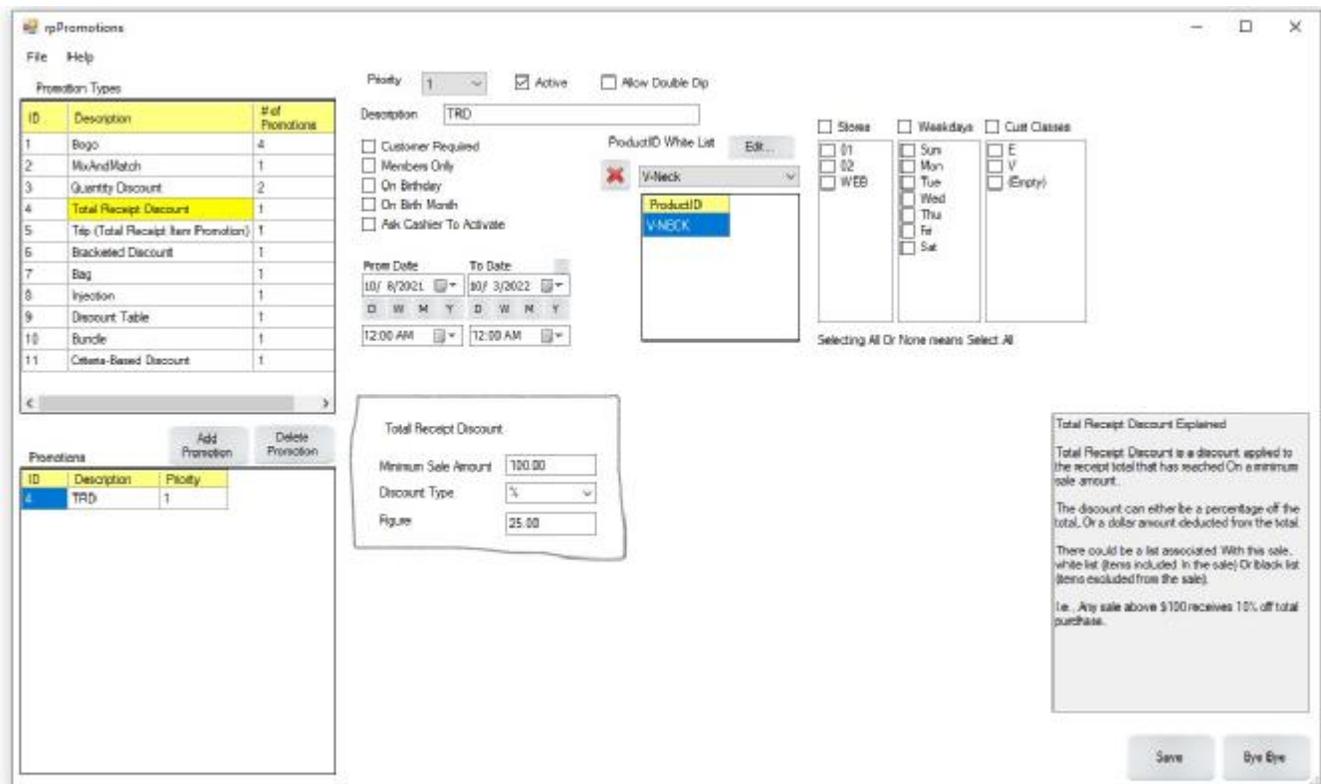
Quantity Discount

A Quantity Discount promotion is used to create different tiers of discounts depending on the quantity of a product purchased, the higher quantity purchased, the lower the sale price will be for each unit. In the bottom-center of the screen, enter how many units one must purchase at each tier in the “Buy” field, then enter the discounted unit sale price in the “Unit Sale Price” field. If the “Items Exceeding Quantity Get The Discount” checkbox is checked, then items exceeding the specific quantity of a tier will still get the discount. In the figure below, two tubs of facecream can be purchased for \$18 each. Four tubs must be purchased for the next discount tier (\$15 each). Since the checkbox is checked, the purchase of 3 tubs will make the third tub \$18. If this checkbox was not checked, then the third tub would be the standard price. The other way this checkbox changes pricing is the combination of multiple quantity discounts. If ten tubs of facecream are purchased, then since the checkbox is selected all ten tubs will be sold for \$10 each since that is the final discount tier. However, if the checkbox was not checked, then the first eight tubs would be sold for \$18 (a buy 2 discount + and a buy 8 discount).



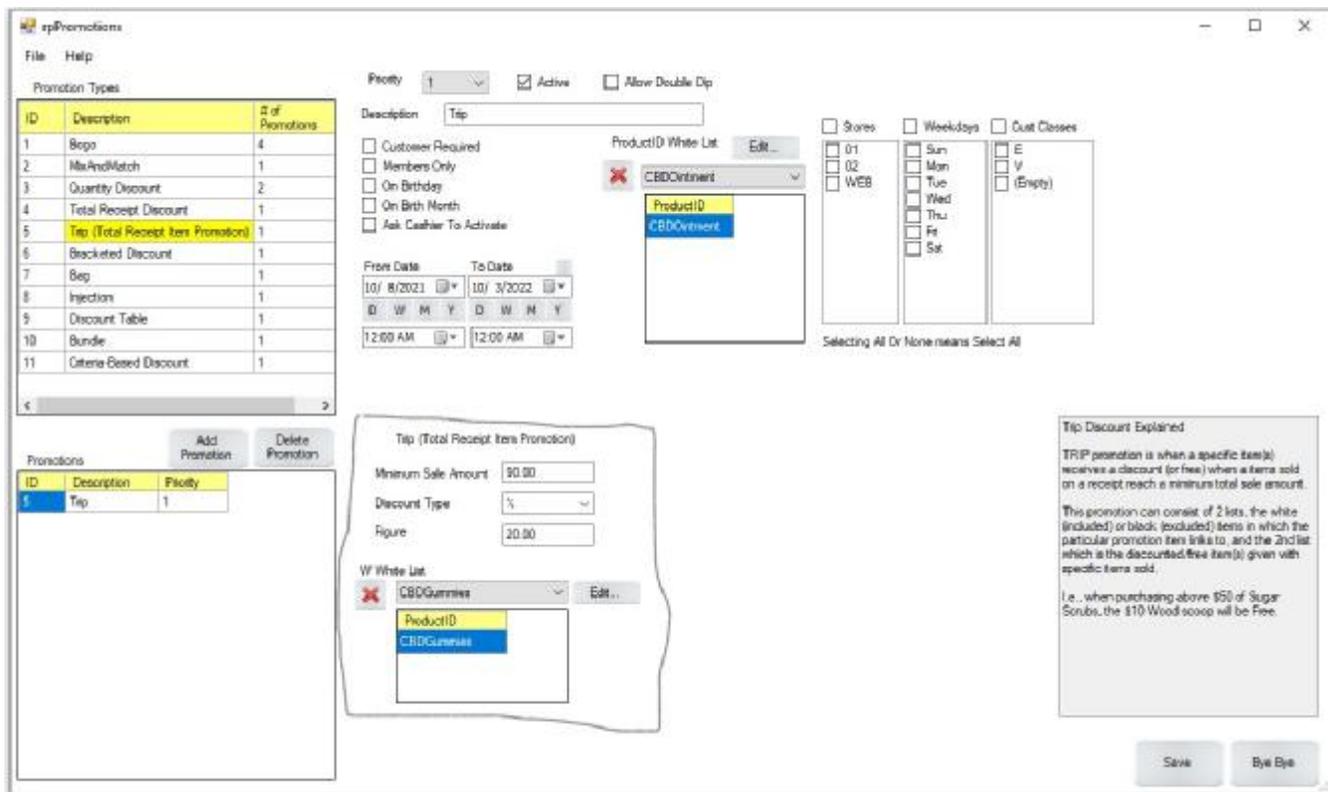
Total Receipt Discount

A Total Receipt Discount promotion applies a discount once a minimum sale amount has been reached. In the “Minimum Sale Amount” field, enter the minimum dollar amount of product that must be purchased. In the “Discount Type” field enter whether this discount will be a percentage or a flat amount. In the “Figure” field, enter the amount of the discount. In the figure below, the purchase of \$100 worth of V-Neck shirts will receive a discount of 25%. Note that if a customer purchases \$100 worth of V-Neck shirts and \$50 worth of jeans for a total of \$150 sale, they will only receive 25% off the \$100 subtotal for V-Neck shirts, not 25% off the total \$150 sale.



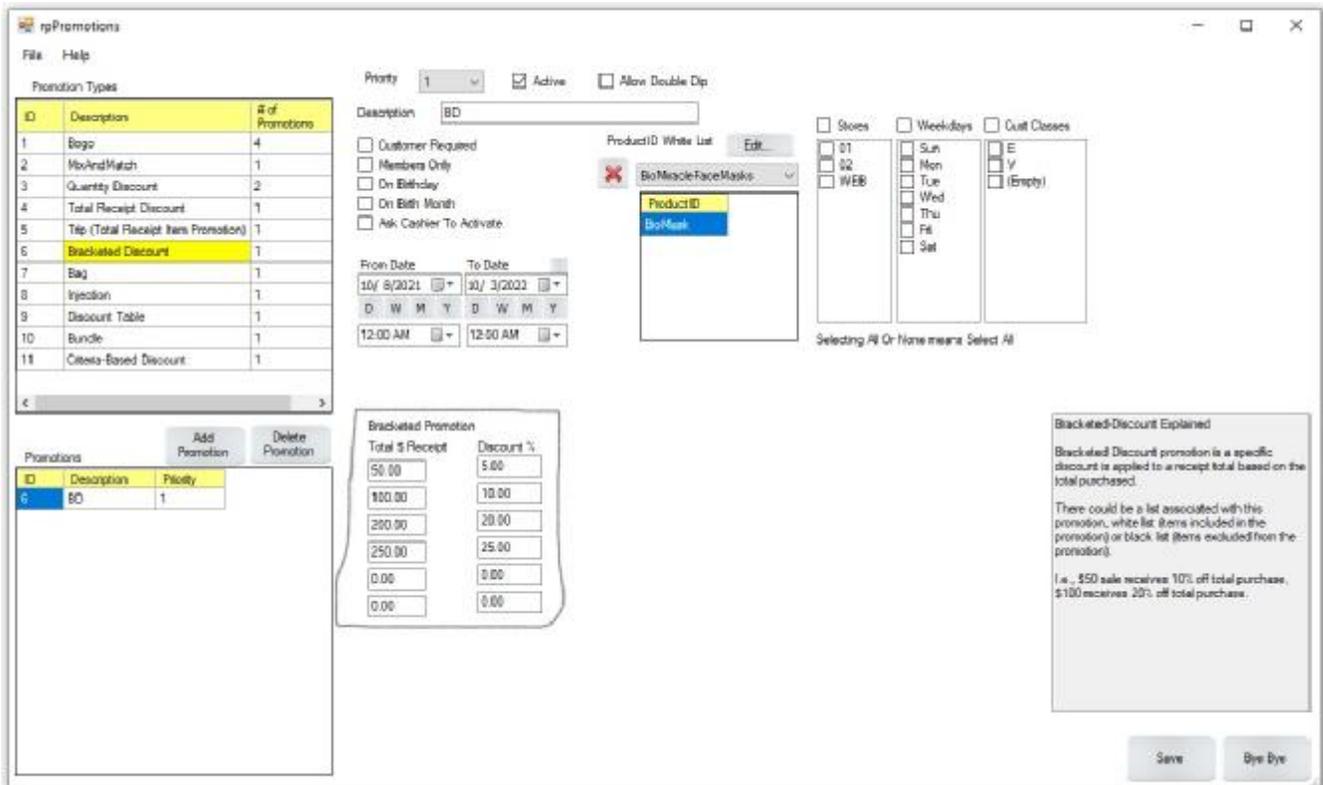
Total Receipt Item Promotion

A Total Receipt Item Promotion is very similar to the Total Receipt Discount. When a minimum dollar amount of a particular product is purchased, then the customer will receive a discount on another product. In the bottom-center of the screen, in the “Minimum Sale Amount” field, enter the amount that must be purchased of the first product in order to receive a discount on the second product. In the “Discount Type” field, enter whether this discount will be a percentage or a flat amount. In the “Figure” field, enter the amount to be discounted. In the below example, a minimum purchase of \$90 worth of ointment will receive a 20% discount on any gummies purchased in addition to that ointment.



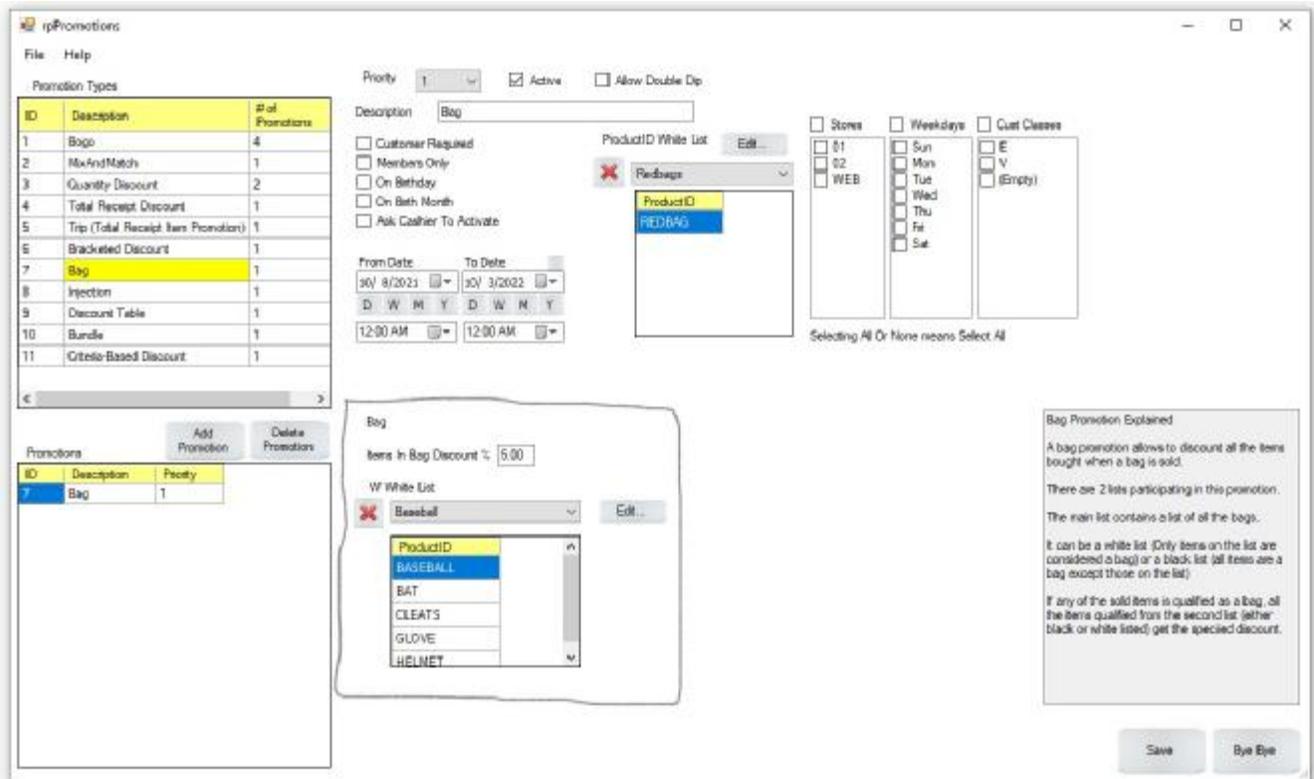
Bracketed Discount

A Bracketed Discount promotion is similar to the Quantity Discount promotion, it provides different discount tiers, but instead of relying on the quantity purchased of a product it is decided by the total receipt amount. In the “Total \$ Receipt” field, enter the dollar amount of product that must be purchased to unlock each tier of discount. In the “Discount %” field, enter the discount percentage that is unlocked at each tier. In the below example, purchase of \$50 worth of FaceMasks will activate a 5% discount, there are additional discounts for every additional \$50 spent up to a total of \$250 for the greatest discount.



Bag

A Bag Promotion allows a percentage discount on all items bought when a bag is sold. Simply select the List for the type of bag(s) at the top of the screen, then at the bottom-center of the screen select the list of products to which the promotion applies. In the “Items in Bag Discount %” field, select the percentage discount that will be applied to the products. In the below example, purchase of a “RedBag” will activate a 5% discount on any baseballs, bats, cleats, gloves, and/or helmets that are purchased in addition to the bag.



Injection

The Injection Promotion type is a VRP-custom written discount query that will be applied to a purchase upon reaching criteria specified by the customer. There are no lists or settings for injections, only if they are currently in use (active) and what level of priority they take when active.

Discount Table

The Discount Table provides the option to enable the discount table (outside The Promotions Admin Module) along with any promotions that have been created in the The Promotions Admin Module. Simply check the “Active” checkbox to enable the Discount Table then select what priority you would like it to have compared to other promotions. You may also enable double dip if you would like the discount table to be applied with other promotions on the same product.

Bundle

The Bundle promotion enables a discount on two different lists of products with specified quantities to activate the promotion. In the bottom-center of the screen, select the list of items for Bundle List 1 and the list of items for Bundle List 2. Once this has been completed, enter the quantity of products that must be purchased for each of these to receive the discount. In the “Discount In” field, enter whether this discount will be a percentage, a flat amount, or simply create a new price for this bundle. In the below example, purchase of 1 popcorn and 2 sodas will enable a \$5 off discount.

The screenshot displays the 'xpPromotions' application window. On the left, a 'Promotion Types' table lists various options, with 'Bundle' selected. Below this is a 'Promotions' table showing a single entry for 'Bundle' with a priority of 2. The main configuration area includes a 'Description' field set to 'Bundle', a 'Priority' dropdown set to 2, and several checkboxes for activation rules. A date and time range is set from 10/8/2021 12:00 AM to 10/3/2022 12:00 AM. A 'Bundle Discount' section is highlighted with a hand-drawn box, showing 'Bundle List 1' with 'Popcorn' (quantity 1) and 'W White List' with 'Soda' (quantity 2). The 'Discount In' dropdown is set to 'Discount' and the 'Discount' field contains '\$5.00'. A 'Bundle Discount Explained' text box on the right provides details about the promotion logic. At the bottom right are 'Save' and 'Bye Bye' buttons.

ID	Description	# of Promotions
1	Boys	4
2	MixAndMatch	1
3	Quantity Discount	2
4	Total Receipt Discount	1
5	Trip (Total Receipt Item Promotion)	1
6	Bracketed Discount	1
7	Bag	1
8	Injection	1
9	Discount Table	1
10	Bundle	1
11	Criteria-Based Discount	1

ID	Description	Priority
10	Bundle	2

Bundle Discount

Bundle List 1: Popcorn (List 1 Buy Qty: 1)

W White List: Soda (List 2 Buy Qty: 2)

Discount In: Discount

Discount: \$5.00

Bundle Discount Explained

Bundle Discount allows to discount two different lists (black or white) of items with specified quantities as part of the bundle.

You can two different lists and specify the exact quantity per list.

I.e. You have list A (white) and list B (white) and you specify list A quantity to be 1 and list B quantity to be 2.

It means the customer has to buy 1 item from list A and 2 items from list B to qualify for one bundle and get the discount.

Criteria-Based Discount

The Criteria-Based Discount enables a discount based on certain criteria such as a Children's Discount or a discount for Veterans. You can use the “Cust Classes” field on the top-right of the screen to select what class of customer this discount will apply to (note it must already be in the system. You cannot create a Veteran's discount if there are no Customer's marked as a Veteran in the system). After selecting the appropriate criteria and which products the discount will apply to, select whether the discount will be a percentage, flat amount, or new price using the “Discount In” field at the bottom-center of the screen. Afterwards, enter the discount value. In the below example, if a customer purchases popcorn on any day of their birth month, then they will receive 50% off their popcorn that day. Note that since the “Ask Cashier to Activate” checkbox is checked, the cashier must manually activate this discount on the register screen of the POS.

The screenshot shows the 'ipPromotions' application window. On the left, there is a 'Promotion Types' table with 11 rows. The 11th row, 'Criteria-Based Discount', is selected. Below this table is a 'Promotions' table with one row: '11 BirthDay Discount' with priority '1'. The main configuration area includes:

- Priority: 1, Active: checked, Allow Double Dip: unchecked
- Description: BirthDay Discount
- Customer Required: checked, Members Only: unchecked, On Birthday: unchecked, On Birth Month: checked, Ask Cashier To Activate: checked
- From Date: 10/8/2021, To Date: 10/3/2022
- Time: 12:00 AM to 12:00 AM
- ProductID White List: Popcorn (ProductID: POPCORN)
- Stores: 01, 02, WEB (unchecked)
- Weekdays: Sun, Mon, Tue, Wed, Thu, Fri, Sat (unchecked)
- Cust Classes: E, V, (Empty) (unchecked)
- Discount In: Percent, Discount: 50.00

 A 'Criteria-Based Discount Explained' text box on the right provides instructions on how to use the feature. At the bottom right are 'Save' and 'Bye Bye' buttons.

ID	Description	# of Promotions
1	Bogo	4
2	MixAndMatch	1
3	Quantity Discount	2
4	Total Receipt Discount	1
5	Tip (Total Receipt Item Promotion)	1
6	Bracketed Discount	1
7	Bag	1
8	Injection	1
9	Discount Table	1
10	Bundle	1
11	Criteria-Based Discount	1

ID	Description	Priority
11	BirthDay Discount	1

Criteria-Based Discount Explained

Criteria-Based Discount allows you to give simple discounts based on the specified criteria.

You can choose a list (black or white) and any item that qualifies will get the specified discount.

You can choose the discount in percent, discount amount or choose a fixed price on item.