

How-To Guide Configuring Discount Reasons

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Introduction

The purpose of this guide is to provide a foundational understanding of the options and capabilities available when configuring Discount Reasons. Discount Reasons mainly consist of Item Discounts, Transaction Discounts and Price Overrides. Reasons are configured based on a Reason Type (Eg: Item Void Reason, Transaction Void Reason) and are associated with a Region in which they are applicable.

The properties of a Reason configuration too depend on the Reason Type. Discount Reasons are Reasons for which either a particular item or an entire transaction is enabled discounts at the checkout. This guide provides the basic step-by-step configurations required to set up the necessary Discount Reasons.

Overview

This guide will cover the configuration for the following:

- **Item Discounts** – Allows setting a discount for a particular item in a transaction.
- **Transaction Discounts** – Allows setting a discount for the entire transaction.
- **Price Overrides** – Allows changing the existing price of a selected item in a transaction.

Prior Training / Experience

You should be familiar with the following:

- Estate Manager Configuration
- Data Broadcasting

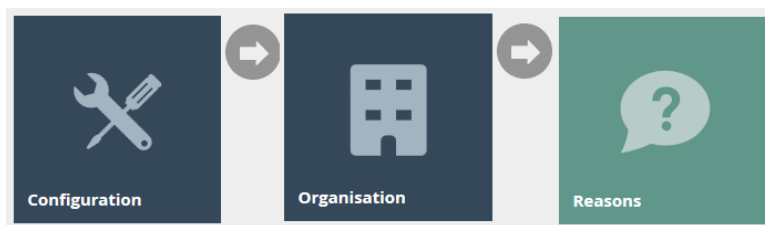
Configuration Steps

Reasons are created based on a pre-defined **Reason Type** and associated with a Region in which they are applicable. Each Reason Type is known to a specific function of the application, that is required to capture reasons of the specific type. Many of the Reason Types relate to Application-Specific built-in functionality.

Item Discounts

Item Discount Reason allows setting a discount for a particular item in a transaction. This governs how manual discounts are handled at the POS. Generally, an Item Discount Reason does not directly impact how a promotional discount is treated.

The reason maintenance application can be accessed through:
Configuration -> Organisation -> Reasons



Reason Maintenance

Region: Reason Type: Reason ID:

	Reason ID	Reason Type	Region	Reason Start Date	Reason End Date	Description
	IV-UK2	Item Void	United Kingdom			Customer Left Store
	IV-FR2	Item Void	France			Customer Left Store
	IV-FR1	Item Void	France			Item Faulty
	IV-UK1	Item Void	United Kingdom			Item Faulty
	IV-AR1	Item Void	All Regions			Item Faulty
	IV-UK4	Item Void	United Kingdom			Item Faulty - Witness Capture

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To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

Select the appropriate Region from the **Region** drop-down.

Select **Item Discount** from the **Reason Type** drop-down.

Enter a unique **Reason ID** for the new Item Discount Reason. The ID can be alphanumeric and contain a maximum of 20 characters.

Reason Maintenance

You are adding a new Reason, please select the Region and Reason Type and enter an ID:

Region

All Regions

Reason Type

Item Discount

Reason ID

ID-001

Back

Create

You will be presented with the following options to complete creating the new Item Discount Reason:

Reason – General Tab

The General tab has all the basic information that captures the identity of the Item Discount Reason.

Reason Maintenance

Save

Cancel

You are editing Item Discount Reason ID: 'ID-VALUE-HADHI' for region 'All Regions'

General

Discount

Employee Discount

Modifier

Item Discounts

Transaction Discounts

Transaction Types

Price Types

Price Change Types

Witness

Description*

£5 Item Discount - H

English (UK)

Function Authorisation Code

-

Capture Reference Number?

☐

Capture Customer Name and Address?

☐

Parent Reason ID

-

Reason Start Date

...

Reason End Date

...

* Denotes Mandatory

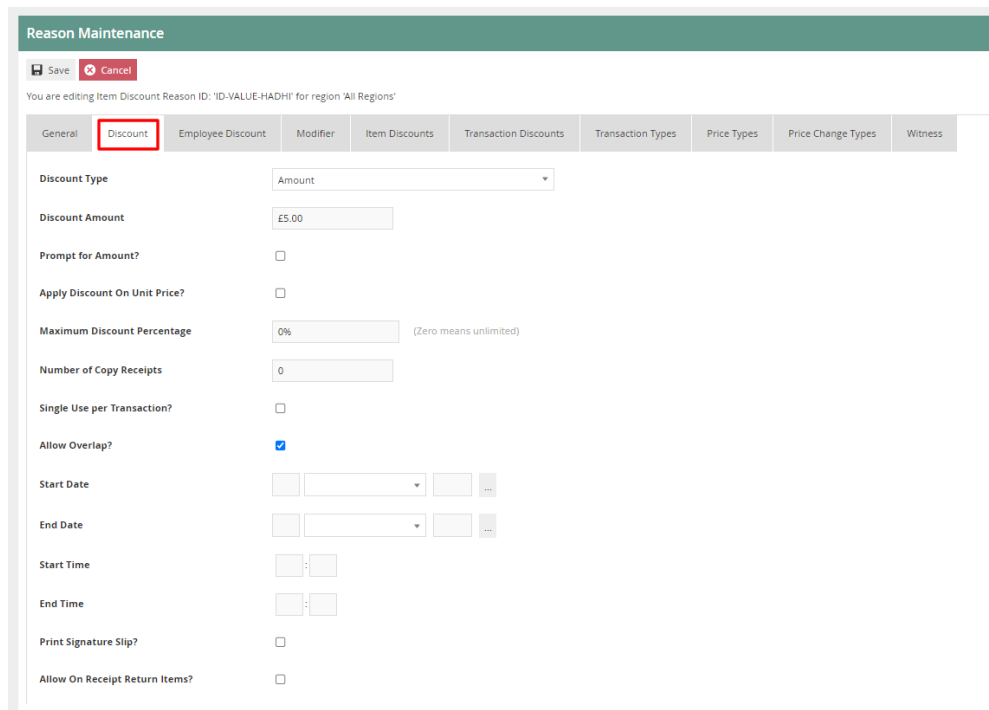
Set the appropriate values on the **General** tab as follows:

Configuration	Description
Description	Enter a user-friendly, meaningful description for the Reason that can be alphanumeric with a maximum of 50 characters.
	Select the locale from the dropdown list of all configured Locales.
Function Authorisation Code	Select the applicable Function Authorisation Code from the drop-down list. These are defined and configured in Role Maintenance and applicable only if the reason selection requires authorisation.
Capture Reference Number	Select check box, if the User should be prompted to enter a reference number when using this Reason.

Capture Customer Name and Address	Select check box, if the User should be prompted to capture the Customer's Name and Address when using this Reason.
Parent Reason ID	If the reason requires a parent reason, select the relevant parent reason from the drop-down list of all configured Reasons of the same Reason Type.
Reason Start Date	Enter a Reason Start Date
Reason End Date	Enter a Reason End Date

Reason – Discount Tab

The Discount tab provides a comprehensive list of properties available for configuration of the specific Item Discount Reason that captures different characteristics of the Discount to be applied.



Configuration	Description
Discount Type	Select an appropriate status of the discount type from a drop-down list. • Percentage – Allows setting a percentage value to be discounted from the total price of the item. • Amount – Allows setting a fixed value to be discounted from the total price of the item. • New Price – Allows setting a new price to the item.
Discount Amount/Percentage	Depending on the selection of the previous field (Discount type), enter either an amount (numeric value) or a percentage (ranging from 0-100).

Rounding Rule	Select an appropriate rounding rule for percentage values from a drop-down list. • Down – Allows to round down a percentage value. • Nearest – Allows to round to the nearest percentage value. • Up – Allows to round up a percentage value.
Prompt for Amount?	Select the checkbox if the User should be prompted to enter the discount amount when using this Reason.
Apply discount on Unit Price?	Select the checkbox if the discount should be applied on Unit Price.
Maximum Discount Percentage	Enter a numeric value ranging from 0-100 which will determine the maximum discount percentage applicable. Setting the value to 0 determines, an unlimited discount percentage is applicable.
Number of Copy Receipts	Enter a numeric value ranging from 0-5 to determine the number of copy receipts.
Single Use per Transaction?	Select the checkbox if this Reason can be used only once in the transaction.
Allow Overlap?	Select the checkbox to indicate that this Reason can be available for selection even if another discount has already been applied.
Start Date	Enter a date from when this Discount is valid.
End Date	Enter a date until when this Discount is valid.
Start Time	Enter a time from when this Reason is valid.
End Time	Enter a time until when this Reason is valid.
Print Signature Slip?	Select the checkbox to indicate that a signature slip will be printed when this Reason is used.
Allow On Receipt Return Items?	Select the checkbox to indicate that this Reason is available for selection on receipt return items.

Select **Save**.

* Multiple Reasons can be created for the Item Discount Reason Type as required. These Reasons will be presented to the operator to select from when performing an Item Discount.

Transaction Discounts

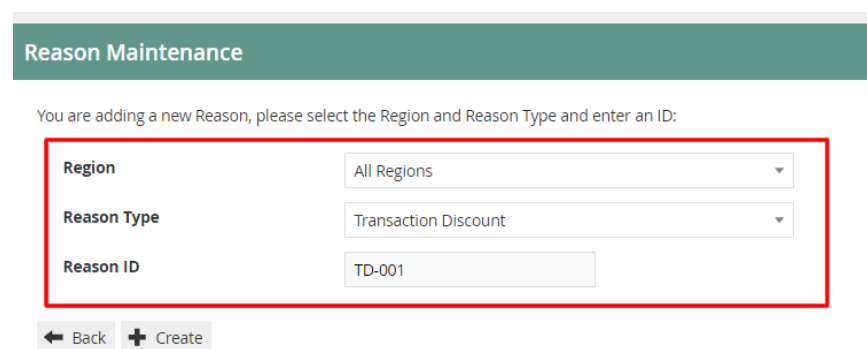
Transaction Discount Reason allows setting a discount for an entire transaction that consists of one or more items. Both Item Discount and Transaction Discount Reason Types capture the same properties in the same set of Tabs of their Reason Maintenance pages with the one exception of the **Include Subsequent Items** property, applicable only to Transaction Discount Reason Types and captured in the Modifier Tab.

To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

Select the Region from the **Region** drop-down.

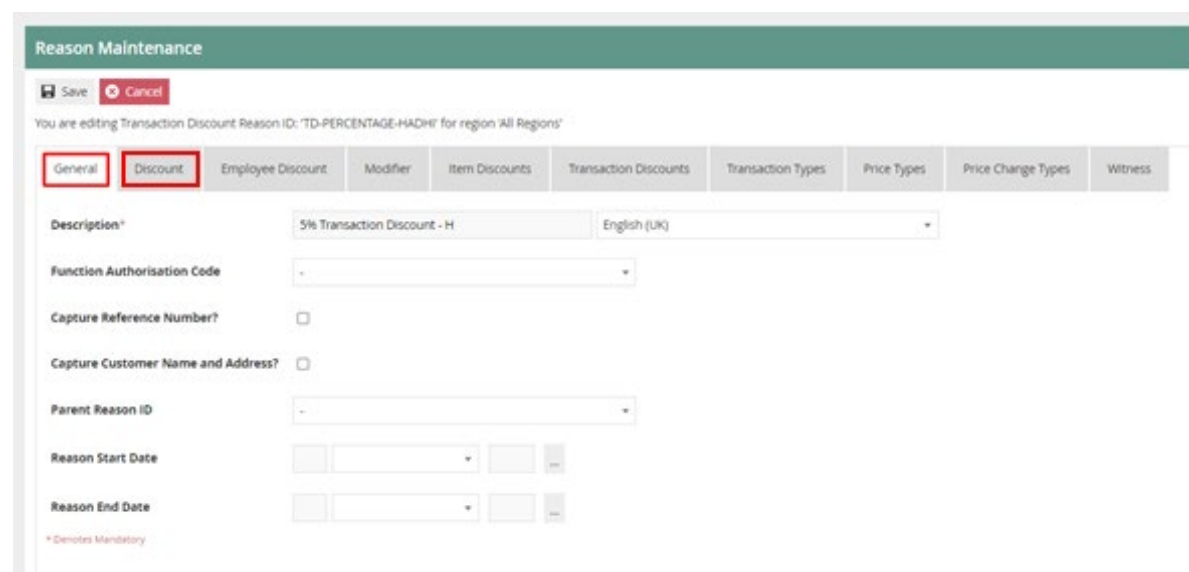
Select **Transaction Discount** from the **Reason Type** drop-down.

Enter a unique **Reason ID** for the new Item Discount Reason. The ID can be alphanumeric and contain a maximum of 20 characters.



The image shows a 'Reason Maintenance' form with a green header. Below the header, a message states: 'You are adding a new Reason, please select the Region and Reason Type and enter an ID:'. The form contains three fields: 'Region' with a dropdown menu showing 'All Regions', 'Reason Type' with a dropdown menu showing 'Transaction Discount', and 'Reason ID' with a text input field containing 'TD-001'. A red rectangle highlights these three fields. At the bottom of the form, there are two buttons: 'Back' with a left arrow and 'Create' with a plus sign.

You will be presented with the following options to complete creating the new Transaction Discount Reason:



The image shows a 'Reason Maintenance' form with a green header. Below the header, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing Transaction Discount Reason ID: 'TD-PERCENTAGE-HADH' for region 'All Regions''. Below this, there are several tabs: 'General', 'Discount', 'Employee Discount', 'Modifier', 'Item Discounts', 'Transaction Discounts', 'Transaction Types', 'Price Types', 'Price Change Types', and 'Witness'. The 'Discount' tab is highlighted with a red rectangle. The form contains several fields: 'Description*' with a text input field containing '5% Transaction Discount - H' and a dropdown menu showing 'English (UK)'; 'Function Authorisation Code' with a dropdown menu showing '-'; 'Capture Reference Number?' with a checkbox; 'Capture Customer Name and Address?' with a checkbox; 'Parent Reason ID' with a dropdown menu showing '-'; 'Reason Start Date' with a date input field; and 'Reason End Date' with a date input field. At the bottom left, there is a note: '* Denotes Mandatory'.

Reason – General Tab

The General tab has all the basic information that captures the identity of the Transaction Discount Reason.

Set the appropriate values on the **General Tab** as per the sample on configuring item discount reason.

Reason – Discount Tab

The Discount tab provides a comprehensive list of properties available for configuration of the specific Transaction Discount Reason that captures different characteristics of the Discount to be applied.

Set the appropriate values on the **Discount Tab** as per the sample on configuring item discount reason.

Reason – Modifier Tab

The Modifier Tab captures a set of flags that determine the applicability of the Discount in diverse circumstances and Item and transaction Types.

Reason Maintenance

Save Cancel

You are editing Transaction Discount Reason ID: 'REST_10_OFF' for region 'All Regions'

General	Discount	Employee Discount	Modifier	Item Discounts	Transaction Discounts	Transaction Types	Price Types	Price Change Types	Witness
Discount Amount Limit £0.00 (Zero means unlimited) Allow for Merchandise Items? ☒ Allow for Non Merchandise Items? ☐ Disallow for Voucher Sales? ☐ Capture Details? ☐ Disallow Promotions ☐ Exclude Return Items ☐ Include Subsequent Items ☐									

If the checkbox against **Include Subsequent Items** is selected, it indicates that after a Discount is applied to the Transaction with this Reason Code, when/if further Items are added to the Transaction, the Discount amount will be re-calculated to include the items added.

Select **Save**.

* Multiple Reasons can be created for the Transaction Discount Reason Type as required. These Reasons will be presented to the operator to select from when performing a Transaction Discount.

Price Overrides

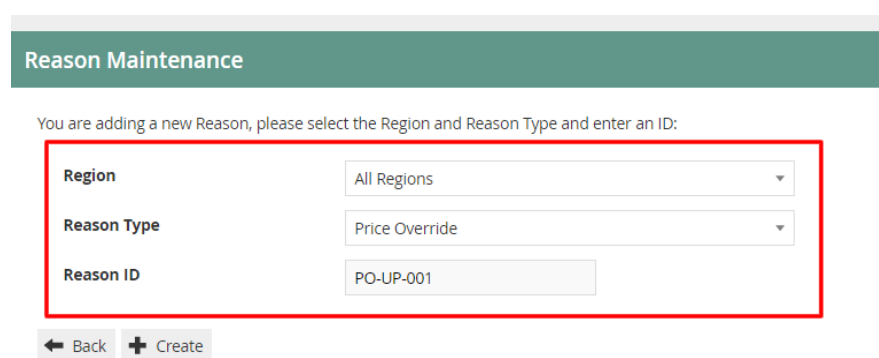
Price Override Reason allows the operator to change the existing price of a selected item in a transaction.

To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

Select the Region from the **Region** drop-down.

Select **Price Override** from the **Reason Type** drop-down.

Enter a unique **Reason ID** for the new Item Discount Reason. The ID can be alphanumeric and contain a maximum of 20 characters.



The screenshot shows the 'Reason Maintenance' page. At the top, a green header bar contains the text 'Reason Maintenance'. Below this, a message states: 'You are adding a new Reason, please select the Region and Reason Type and enter an ID:'. A red rectangular box highlights the form fields. Inside the box, there are three rows: 'Region' with a dropdown menu showing 'All Regions', 'Reason Type' with a dropdown menu showing 'Price Override', and 'Reason ID' with a text input field containing 'PO-UP-001'. Below the red box, there are two buttons: 'Back' with a left arrow icon and 'Create' with a plus icon.

You will be presented with the following options to complete creating the new Price Override Reason:

Reason – General Tab

The General tab has all the basic information that captures the identity of the Price Override Reason.

Set the appropriate values on the **General Tab** as per the sample on configuring item discount reason.

Reason – Price Override Tab

The Price Override tab provides properties which allows to set values and constraints on the specific Price Override Reason.

Reason Maintenance

Save

Cancel

You are editing Price Override Reason ID: 'PO-UP-HADHI' for region 'All Regions'

General

Price Override

Modifier

Transaction Types

Price Types

Price Change Types

Witness

Allow Override Up?

☒

Maximum Percentage Increase

10%

(Zero means unlimited)

Allow Override Down?

☐

Maximum Percentage Decrease

0%

(Zero means unlimited)

Fixed Price

£0.00

(Zero means unlimited)

Allow On Receipt Return Items?

☐

Disallow After Item Discount

☐

Apply On Gross

☐

Set the appropriate values on the **Price Override** tab as follows:

Configuration	Description
Allow Override Up?	Select the checkbox to determine that the price can be overridden and increased when this reason is used.
Maximum Percentage Increase	Enter a numeric value ranging from 0-100 which will determine the maximum percentage increase applicable. Setting the value to 0 determines, an unlimited percentage is applicable.
Allow Override Down?	Select an appropriate rounding rule for percentage values from a drop-down list. Down – Allows to round down a percentage value. Nearest – Allows to round to the nearest percentage value. Up – Allows to round up a percentage value.
Maximum Percentage Decrease	Select checkbox to indicate that the price can be reduced when this reason is used.
Fixed Price	Allows setting a fixed price. Set a fixed numeric value that will determine the price which will be used whenever this reason is selected. This price will be applied when using this Reason, regardless of the product price. If set to 0 it indicates that the fixed price is not applicable.
Allow On Receipt Return Items?	Select the checkbox to indicate that this Reason is available for selection on receipt return items.
Disallow After Item Discount	Select checkbox to indicate that this Reason cannot be selected after an item discount is already applied. To use this price override reason, in addition to an item discount, leave this unchecked.
Apply on Gross	Select the checkbox to indicate that this price override reason is applied on the gross transaction amount.

Reason – Modifier Tab

Reason Maintenance

 Save  Cancel

You are editing Price Override Reason ID: 'PO-UK-03' for region 'United Kingdom'

General	Price Override	Modifier	Transaction Types	Price Types	Price Change Types	Witness
Price Override Amount Limit			(Zero means unlimited)			
Allow for Merchandise Items?			☒			
Allow for Non Merchandise Items?			☐			
Disallow for Voucher Sales?			☐			
Capture Details?			☐			
Disallow Promotions			☐			

Set the appropriate values on the **Modifier** tab as follows:

Configuration	Description
Price Override Amount Limit	Enter a numeric value that will indicate the maximum amount by which the price can be overridden. Setting the value to 0 determines, an unlimited amount is applicable.
Allow for Merchandise Items?	Select checkbox to indicate that this Reason is applicable to Merchandise Items.
Allow for Non Merchandise Items?	Select checkbox to indicate that this Reason is applicable to Non Merchandise Items.
Disallow for Voucher Sales?	Select checkbox to indicate that this Reason is not allowed for Voucher Sales.
Capture Details	Select checkbox to prompt the User to capture details when using this Reason.
Disallow Promotions	Select checkbox to indicate that promotions are not allowed when using this Reason.

Select **Save**.

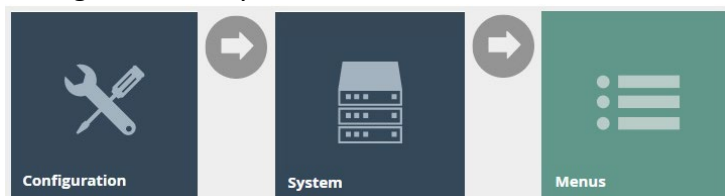
* Multiple Reasons can be created for the Price Override Reason Type as required. These Reasons will be presented to the operator to select from when performing a Price Override.

Menus

To enable the use of the above reasons, appropriate Menus and Role privileges should be configured separately.

The menu maintenance application can be accessed through:

Configuration -> System -> Menus



The **Sale Menu** contains most of the functions that will be required by a retailer. Most of the customization work will involve restructuring the hierarchy of the menu, removing unnecessary items, or potentially adding a new item.

A screenshot of the 'Menu Maintenance' application window. The window has a title bar with a question mark, a pause icon, and a close icon. Below the title bar is a toolbar with 'Save' and 'Cancel' buttons. The main content area shows a form for editing a menu. The 'Name' field is set to 'SALE'. The 'Menu Type' dropdown is set to 'Tree'. The 'Menu Category' dropdown is set to 'Retail'. Below the form is a tree view showing the menu structure. The tree view has a root node 'SALE' with several sub-nodes: '1 - Sales', '2 - Dept Sale', '3 - Voids', '4 - Returns', '5 - Discount / Overrides', '6 - Management', and '7 - SignOff'. At the bottom of the tree view, there are three buttons: 'Add a new Button Folder', 'Add a new Button', and 'Add...'. The 'Add...' button is highlighted with a red box.

Following are the events that can be configured for this reason menu:

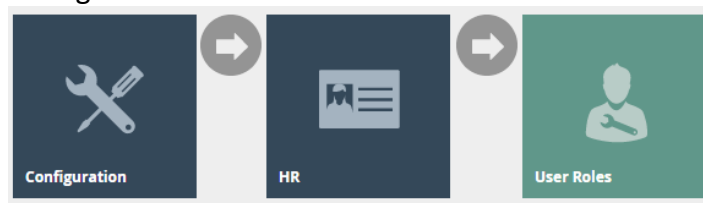
Reason Type	Event Name	Event ID
Item Discount	Item Discount	ItemDiscount
Transaction Discount	Transaction Discount	TransactionDiscount
Price Override	Price Override	PriceOverride

*Configuring Menus is further described in a separate How-to Guide.

Roles

The configuration interface used to specify User Roles facilitates the selection of required permissions by applying a discovery process to the Package resources of the Enactor Retail Software itself. Named Privileges are associated with individual Functions, which assert their requirement. The required Permissions implicitly correspond to these Privileges and provide the building blocks used to construct User Roles.

The user role maintenance application can be accessed through:
Configuration -> HR -> User Roles



Authorisation to run the specific functionality documented here are controlled with privileges maintained in roles.

Select the appropriate role you wish to edit, the example here is using SALES_ASSISTANT.

User Role Maintenance

Save Cancel

You are editing user role ID: 'SALES_ASSISTANT' for region 'All Regions'

General Authorised Functions Special Functions Report Functions

Application Package: Enactor POS Function ID: Starts With

Process: # Discount Item Function Name: Starts With

Apply Filters Reset Filters

	Package	Process	Function ID	Function Name
☒	Enactor POS	Discount Item	enactor.pos.AuthorisesDiscountItem	Authorises Discount Item
☒	Enactor POS	Discount Item	enactor.pos.DiscountItemAllowed	Discount Item Allowed
☐	Enactor POS	Discount Item	enactor.pos.SkipItemDiscountCancelNotification	Skip Item Discount Cancel Notification

☒ Enable All Displayed Functions ☒ Disable All Displayed Functions

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Select the enactor POS package and configure the privileges as required.

Following are the privileges that can be configured for this user role:

Reason Type	Package	Function ID
Item Discount	Enactor POS	enactor.pos.AuthorisesDiscountItem
		enactor.pos.DiscountItemAllowed
Transaction Discount	Enactor POS	enactor.pos.AuthorisesTransactionDiscount
		enactor.pos.TransactionDiscountAllowed
Price Override	Enactor POS	enactor.pos.AuthorisesPriceOverride
		enactor.pos.PriceOverrideAllowed

* Configuring User Roles is further described further in a separate How-to Guide.

Broadcasting

To deliver the configuration changes to the POS, broadcast the following entity.

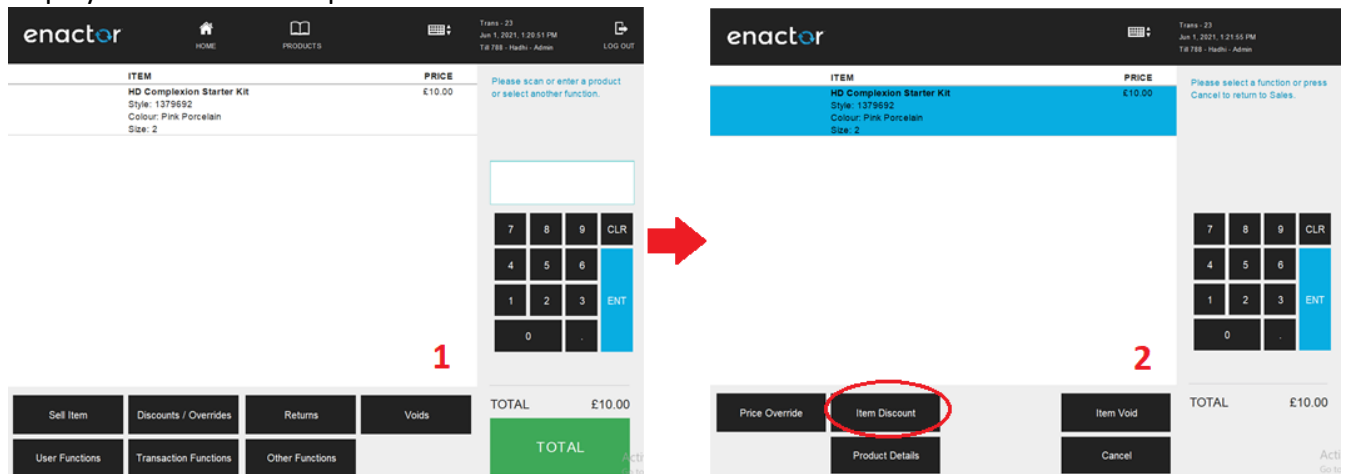
- Reason
- Menu
- Roles

POS Functionality

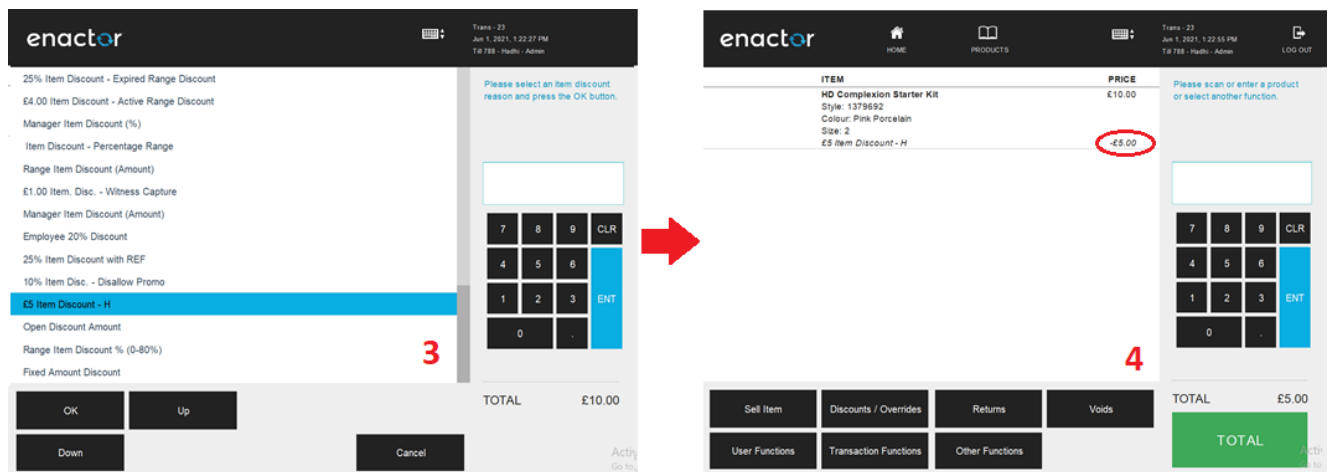
Item Discount Reason Functionality

On adding products to the bag, the operator will be presented with screen 1.

Select product as shown on screen 2, to view all applicable functions for the product displayed at the bottom pane.



Select **Item Discount** and a set of configured Item Discount Reasons are displayed to the operator as shown on screen 3.

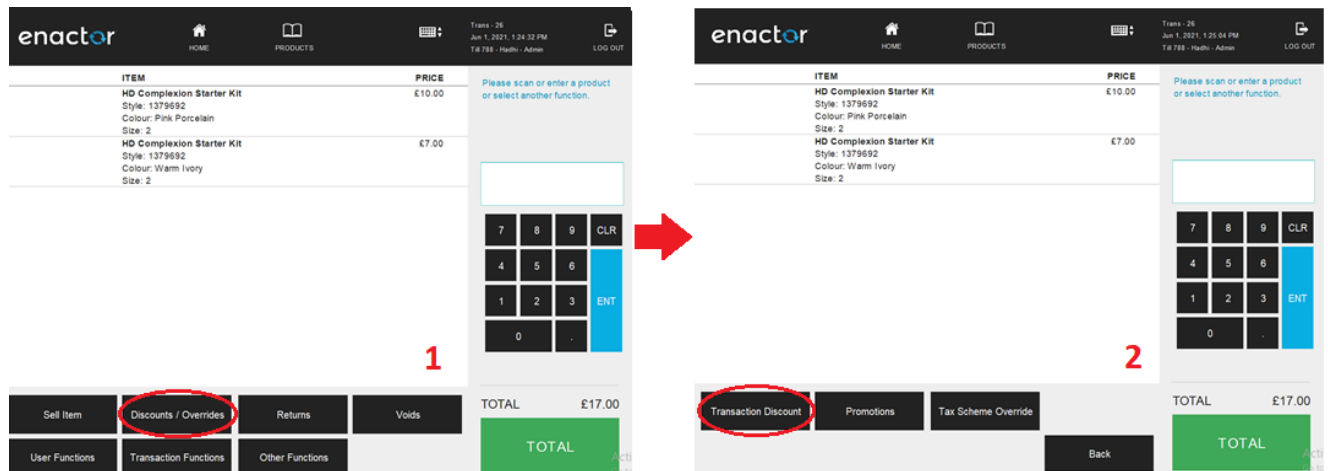


The operator can then select the applicable Reason and click **OK** to apply the Item Discount to the selected product and it will appear as shown on screen 4.

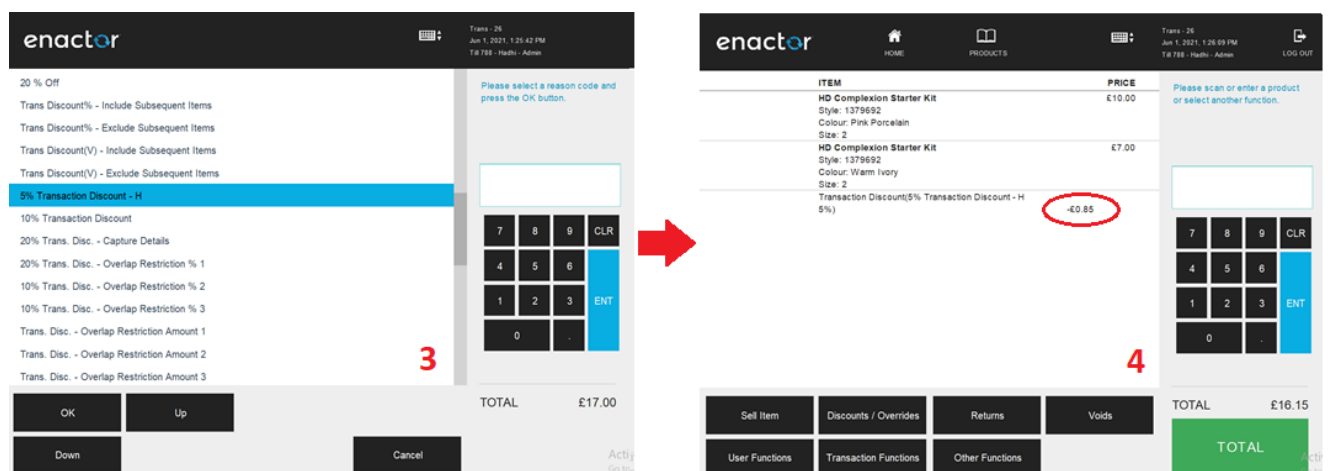
Transaction Discount Reason Functionality

On adding products to the bag, the operator will be presented with screen 1.

Select **Discounts / Overrides** and the operator will be navigated to screen 2.



Select **Transaction Discount** and a set of configured Transaction Discount Reasons are displayed to the operator as shown on screen 3.

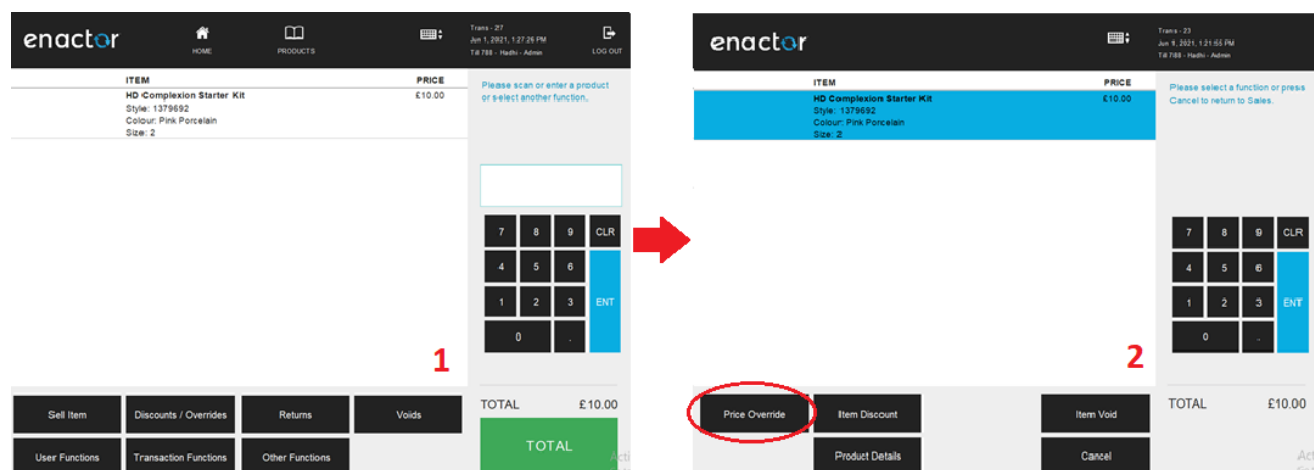


The operator can then select the applicable Reason and click **OK** to apply the Transaction Discount to the selected transaction which will appear as shown on screen 4.

Price Override Reason Functionality

On adding products to the bag, the operator will be presented with screen 1.

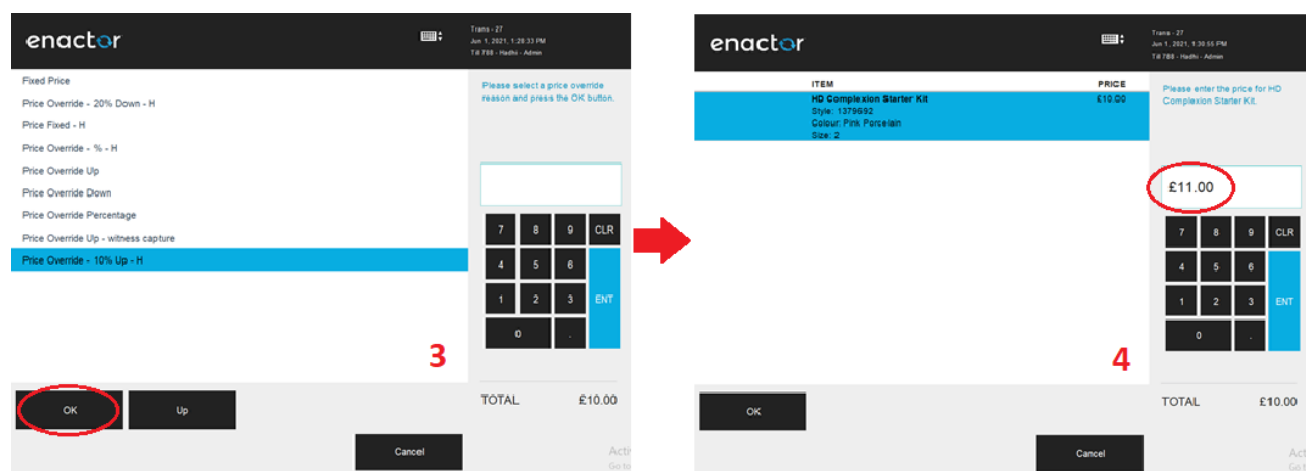
Select product as shown on screen 2, to view all applicable functions for the product displayed at the bottom pane.



Select **Price Override** and a set of configured Price Override Reasons are displayed to the operator as shown on screen 3.

The operator can then select the applicable Reason and click **OK** to apply the Price Override function to the selected product.

As shown on screen 4 the operator will be prompted to **enter** the new price applicable.



* Make sure to enter a value which will meet the configured conditions of the selected Price Override Reason.

Select **OK**, to apply the desired Price Override Reason to the selected product as follows:

The screenshot shows the enactor POS interface. At the top, there's a header with the enactor logo, navigation icons for HOME, PRODUCTS, and a calculator icon, and transaction details: Trans - 27, Jun 1, 2021, 1:31:19 PM, Till 788 - Hadhi - Admin, and a LOG OUT button.

The main area displays a product list with columns for ITEM and PRICE. The selected item is "HD Complexion Starter Kit" with a price of £11.00. Below the item name, there are details: Style: 1379692, Colour: Pink Porcelain, Size: 2. A red oval highlights the "Price Override - 10% Up - H (£10.00 to £11.00)" text.

To the right of the product list, there's a prompt: "Please scan or enter a product or select another function." Below this is a numeric keypad with buttons for digits 0-9, CLR, and ENT. The ENT button is highlighted in blue.

At the bottom, there's a grid of function buttons: Sell Item, Discounts / Overrides, Returns, Voids, User Functions, Transaction Functions, and Other Functions. To the right of this grid, the TOTAL is displayed as £11.00, and a large green button labeled "TOTAL" is visible.

About This Document

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The amendment history of this document can be found in the table below.

Current Document Version information

Document Version 1.0

Product Version 2.6

Document Context

This document is part of the Enactor Product Documentation Series. All Enactor products include a comprehensive documentation set designed to improve understanding of the product and facilitate ease of use.

Document Inquiries

At Enactor we aspire to producing the highest quality documentation to reflect and enhance the quality of our product. If you find that the document is inaccurate or deficient in any way, please assist us in improving our standard by letting us know.

For matters of document quality or any other inquiries regarding this document please contact:

By Email: documentation@enactor.co.uk

Document History

The following versions of the document have been produced:

VERSION	STATUS	ISSUE DATE	AUTHOR	REASON FOR ISSUE
1.0	Initial Draft	03/08/21	Thilini Sayakkara	Initial version