Setting Up & Selling Coupons
(Dollar Discount & Percentage Discount)

"GETTING STARTED GUIDE"

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Coupons – Dollar Discount:

❖ Dollar Discount Coupons discount the entire sale only.

Configuration – Dollar Discount

1. Open **CAP SellWise Pro** and enter the appropriate *Sales Code* and *Password.*
2. Go to: **Help → Configuration → Departments.**
3. **Add** a **Department** named, *"Dollar Discount"* and press **Accept,** then **Cancel** from *Departments.* Take note of the Department code that the software automatically assigns. In the example below, the Department code is "086.000.000." Please note, it is not necessary to enter a *Tax Code* or *Profit %,* as this is only used for *Open Departments* and/or *Discount Percentage* coupons. *(Please see image below)*

4. In *Configuration,* select **Phone/Shipping/Lottery/ Miscellaneous.**
5. Within the section named, *'Other,'* apply the appropriate **"Dollar Discount"** department code next to *Dollar Discount Department Code* and press **Accept.** *(Please see image below)*

Other	
Stock Locater used for Line Remarks	706
Membership Department Code	079.000.000
Rental Department Code	075.000.000
Discount Percentage Department Code	085.000.000
Dollar Discount Department Code	086.000.000
Fintech Customer ID	4444
Shopping Cart Download Format File	None

6. **Esc Cancel** then **Esc Exit** from *Configuration.*

7. If desired, create **Shortcut Keys** for *Dollar Discounts* in *Configuration* once the inventory item/items have been created. This is explained in the next section named, *"Inventory – Dollar Discount." (Please see image below)*
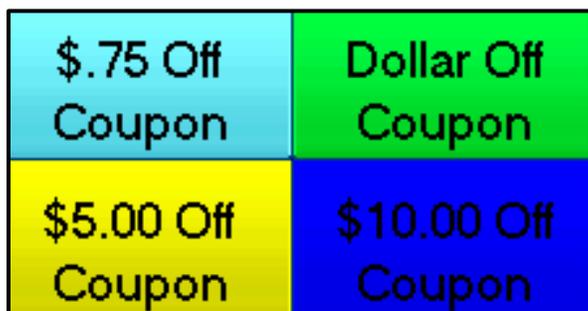
Inventory – Dollar Discount

1. In the SellWise Pro toolbar, select **Inventory** and press **Add New Item.**
2. Within the *Main* tab, add a desired *Description* of the inventory item appropriate for the coupon. For Example, "$5.00 Off Coupon."
3. Within the *Main* tab, set the *List Price* to the negative price of the coupon. For example, a $5.00 Off Coupon will have -5.00 for the List Price.
4. Within the *Main* tab, set the *Tax Code* to **Non-Taxable.**
5. Within the *Main* tab, select **Find Dept** and attach the appropriate *"Dollar Discount"* department.
6. Within the *Additional Information* tab, set *Discounts Allowed* to **No.**
7. Within the *Additional Information* tab, set *Non Decrementing* to **Yes.**
8. Add all other pertinent information for the inventory item and **Accept.**
9. Repeat steps 1-8 for each "Dollar Discount" coupon. For example, "Dollar Off Coupon," "$10.00 Off Coupon," "$.75 Off Coupon," etc. Press **Accept,** then **Esc Cancel** and **Exit** the *Inventory* module. *(Please see images below)*

POS – Dollar Discount

1. Open **POS** from the SellWise Pro toolbar or double-click to open **CAP POS** on the desktop.
2. Add the necessary items to the sale and add/scan the appropriate *"Dollar Discount"* coupon.
3. Choose the appropriate **Tender** to complete the sale. *(Please see image below)*

www.capretail.com, sales@capretail.com, support@capretail.com
Sales (800) 826-5009, Support (817) 560-7007 Monday - Friday, 8:00am-6:00pm Central Time

Reports – Dollar Discount

Sales by Department – Dollar Discount

❖ The **Sales by Department** report shows the breakdown of sales, in detail or summarized, by department.

1. In the SellWise Pro toolbar, select **Reports.**
2. Within the *'Sales'* section of the Reports module, select **Sales by Department.**
3. Choose all necessary options to sort and view the report and press **Accept.** Please note, you can view the report by selecting the appropriate *"Dollar Discount" Department* or view the report by all *Departments. (Please see image below)*

Discounts – Dollar Discount

❖ The **Dollar Discounts** report shows line-items for all "Dollar Discounts."

1. In the SellWise Pro toolbar, select **Reports.**
2. Within the *'Sales'* section of the Reports module, select **Discounts** then select **Dollar Discounts.** *(Please see images below)*
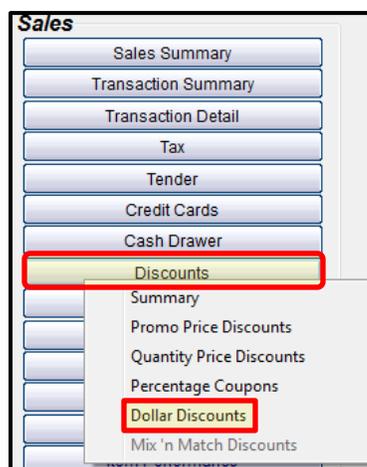
SL	Description	Dollar Value	Qty Sold	Total Discount
732	Dollar off	1.00	1	1.00
733	$5.00 Off Coupon	5.00	2	10.00

Coupons- Percentage Discount:

❖ Percentage Discount Coupons discount the entire sale only.

Configuration – Percentage Discount

1. Open **CAP SellWise Pro** and enter the appropriate *Sales Code* and *Password.*
2. Go to: **Help → Configuration → Departments.**
3. **Add** a **Department** named, *"Discount %"* and press **Accept.** Take note of the Department code that the software automatically assigns.
4. Within *'Departments,'* click to highlight **Discount Percent** department, select **Add** and then choose **Sub-Department.**
5. Enter an appropriate *'Sub-Department'* name and enter the appropriate percentage discount within the *Profit Margin %* section and press **Accept.** For example, a Sub-Department named "Discount 20%" will have "20" within the Profit Margin %. (Please see image below)

6. Repeat steps 4 and 5 for each Sub-Department. For example, Discount 10%, Discount 15% Discount 25%, etc. Press **Accept** and then **Cancel** from *'Departments.'*

7. Within *Configuration*, select **Phone/Shipping/Lottery/Miscellaneous.**
8. Within the section named *'Other,'* apply the **"Percentage Discount"** department next to *Discount Percentage Department Code* and press **Accept.** *(Please see image below)*

Other	
Stock Locater used for Line Remarks	706
Membership Department Code	079.000.000
Rental Department Code	075.000.000
Discount Percentage Department Code	085.000.000
Dollar Discount Department Code	086.000.000
Fintech Customer ID	4444
Shopping Cart Download Format File	None
Email Daily reports to	Enter The Appropriate Email Address Here
Show Change in Tendered Currency	No

9. **Esc Cancel** from *Phone/Shipping/Lottery/Miscellaneous* and then **Esc Exit** *Configuration.*
10. If desired, create **Shortcut Keys** for *Percentage Discounts* within *Configuration* once the inventory item/items have been created. This is explained in the next section named, *"Inventory – Percentage Discount." (Please see image below)*

Inventory – Percentage Discount

1. In the SellWise Pro toolbar, select **Inventory** and press **Add New Item.**
2. Within the *Main* tab, add a desired *Description* of the inventory item for the coupon. For example, "20% Off Coupon."
3. Within the *Main* tab, set the *Tax Code* to **Non-Taxable.**
4. Within the *Main* tab, select **Find Dept**, expand the *Discount %* department and attach the appropriate **"Percentage Discount"** Sub-Department. For example, a 20% Off Coupon will have the 20% Discount Sub-Department attached.
5. Within the *Additional Information* tab, set *Discounts Allowed* to **No.**
6. Within the *Additional Information* tab, set *Non Decrementing* to **Yes.**
7. Add all other pertinent information for the inventory item and **Accept.**

8. Repeat steps 1-7 for each *"Percentage Discount"* coupon. For example, "10% Off Coupon," "15% Off Coupon," "25% Off Coupon," etc. Press **Accept,** then **Esc Cancel** and **Exit** the *Inventory* module. *(Please see images below)*

Stock Locater 731.	**Description** 20% Off Coupon	5
Vendor Item # 731	**Sub-Description**	
Non-Decrementing Item	**Edit UPC** ▾	
Unit of Measure Ea - Each ▾		

Main	**Additional Information**	**Messages**

Cost/Price

Current Cost	0.00	Margin	%
Actual Cost	0.00	Markup	%
List Price	0.00		
Sell Price			

Tax Code Non Taxable ▾   **Volumetric Tax $**

Find Vendor

AltVend

| | Dept Code | Dept --Sub Dept-- | Class |
| **Find Dept** | 085.003.000 Discount % - Discount 20% |

```
Deposits... 083.000.000
Discount %... 085.000.000
   Discount 10%... 085.001.000
   Discount 15%... 085.002.000
   Discount 20%... 085.003.000
   Discount 25%... 085.004.000
Dollar Discount... 086.000.000
```

Ordering Information

On Hand	0	Maximum	1
On Order	0	Minimum	0
Qty / Pack	1	Has Sold	No
Re-Order	No	Last Sold	

Stock Locater 731.	**Description** 20% Off Coupon	
Vendor Item # 731	**Sub-Description**	
Non-Decrementing Item	**UPC(s)** ▾	
Unit of Measure Ea - Each ▾		

Main	**Additional Information**	**Messages**

Pricing Options

Price Levels

Promo Prices

Quantity Prices

Kit Item

☐ Kit   ☐ Kit Plus

Add Kit

Matrix

☐ Matrix Root   ☐ Matrix Item

View Matrix

Serialized Item

Serialized   No   **View Serialized**

View Warranty

Food Stamp	No
Sell by Weight	No
Sell by Dollar Amount	No
Discounts Allowed	**No**
Web Enabled	No
Non Decrementing	**Yes**
FSA Eligible	
Sign. Required FSA	No
Commissionable	Yes
Verify Age	years

Mix 'n Match Code		View
Break Pack Link to SL	
Item Link to SL	
Stock Link to SL	

Add Picture

Remove Picture

POS – Percentage Discount

1. Open **POS** from the SellWise Pro toolbar or double-click to open **CAP POS** on the desktop.
2. Add the necessary items to the sale and add/scan the appropriate *"Percentage Discount"* coupon.
3. Choose the appropriate **Tender** to complete the sale. *(Please see image below)*

Reports – Percentage Discount

Sales by Department – Percentage Discount

❖ The **Sales by Department** report shows the breakdown of sales, in detail or summarized, by department, however, DO NOT sort this report by *'All Departments'* for Percentage Discounts as the percentage amount will not appear in the report. It is necessary to sort Percentage Discounts by the *'Percentage Discount'* department only.

1. In the SellWise Pro toolbar, select **Reports.**
2. Within the *'Sales'* section of the Reports module, select **Sales by Department.**
3. Choose **Select Department** and then apply the appropriate **"Discount %"** department to view all Percentage Discounts or you can select the appropriate **Sub Dept** to view a specific percentage discount. Press **Accept.** *(Please see image below)*

Department DISCOUNT %	Sub Dept.	Class	Dept Code	Description	Quantit	Price	Discount	Profit$	Profit	S/L	ItemID
	Discount 10		085.001.000	10% Off Coupon	1.0	0.00	8.83		.0	729.	729
		Sub Total			1	.00	8.83		.00%		
	Discount 15		085.002.000	15% Off Coupon	1.0	0.00	8.34		.0	730.	730
		Sub Total			1	.00	8.34		.00%		
	Discount 20		085.003.000	20% Off Coupon	1.0	0.00	6.00		.0	731.	731
		Sub Total			1	.00	6.00		.00%		
	Discount 25		085.004.000	25% Off Coupon	1.0	0.00	5.00		.0	741.	741
		Sub Total			1	.00	5.00		.00%		
	Dept Total				4	.00	28.17		.00%		

Discounts – Percentage Coupons

❖ The **Percentage Coupons** report shows line-items for all "Percentage Discounts."

1. In the SellWise Pro toolbar, select **Reports.**
2. Within the *'Sales'* section of the Reports module, select **Discounts** then select **Percentage Coupons.** *(Please see images below)*
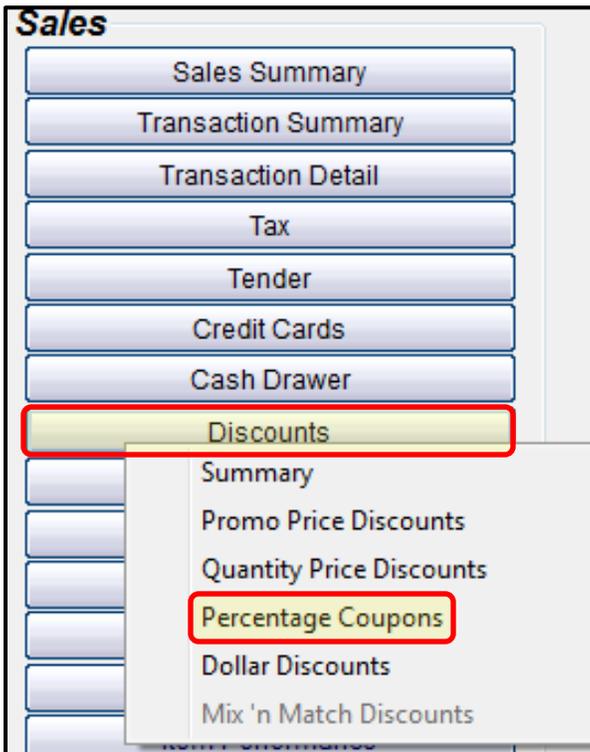
Department	Dept Code	Description	Sub Desc	Sale	Date	Discount Amount	Discount %
Discount 10%	085.001.000	10% Off Coupon		90.47	11/07/2012	8.83	10%
			Dept Total	**90.47**		**8.83**	
Discount 15%	085.002.000	15% Off Coupon		50.24	11/07/2012	8.34	15%
			Dept Total	**50.24**		**8.34**	
Discount 20%	085.003.000	20% Off Coupon		25.50	11/07/2012	6.00	20%
			Dept Total	**25.50**		**6.00**	
Discount 25%	085.004.000	25% Off Coupon		15.95	11/07/2012	5.00	25%
			Dept Total	**15.95**		**5.00**	

Discounts – Summary

❖ The **Summary** report shows line-items for all "Percentage Discounts" to include Percentage Discount coupons as well as Percentage Discounts tendered in the POS.

1. In the SellWise Pro toolbar, select **Reports.**
2. Within the *'Sales'* section of the Reports module, select **Discounts** then select **Summary.** *(Please see images below)*
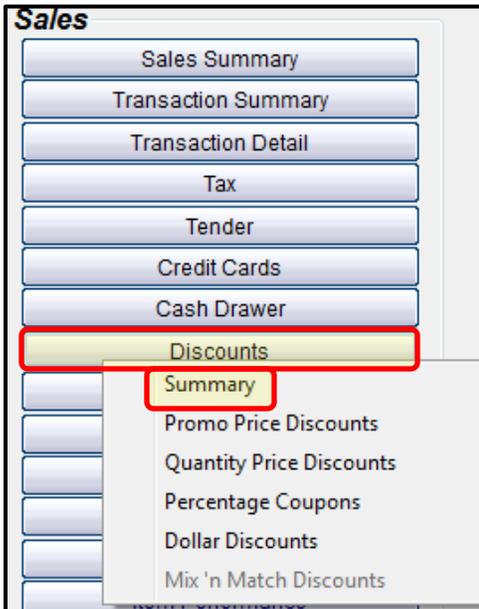
Discount Type	Qty	Discount %	$ Discounts
10% Discount	2	10%	14.39
15% Discount	1	15%	8.34
20% Discount	2	20%	89.10
25% Discount	1	25%	5.00
0% Discount	0	0%	.00
Total Sale Discounts	6		116.83
Total line Item Discounts	0		.00
Total Frequent Buyer Awards	0		.00
Total Dollar Discounts	0		.00
Total Promo Discounts	0		.00
Total Quantity Price Discounts	0		.00
Total Mix 'n' Match Discounts	0		.00
Selling Price Discounts	0		.00
Total other Discounts	0		.02
Total All Discounts	6		116.85
Total Discounted Sales	6		
Discount Percentage Coupons	4		28.17