

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 \rightarrow Configuration \rightarrow 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)

Department	Sub-Departme	nt Class
086	000	000
Dollar Discount		
Department Nam	е	
Dollar Discount		
Tax Code	Profit M	argin %
	▼ 10	_
Age for Sales of Enter Age	of Restricted Pro Years	oducts
Sales Commissio (this overrides c	on Rate for eligi ommission set o	ble Employees on Sales Code)
NOTE: An entry be paid on any i Values set at De Sub-Depts and	of 0% means i tem in this Dep ept Level will be Classes	no commission will artment. e applied to
F1 Help	F10 Accept	Esc Cancel

- 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*)

\$.75 Off	Dollar Off
Coupon	Coupon
\$5.00 Off	\$10.00 Off
Coupon	Coupon

Inventory – Dollar Discount

- 1. In the SellWise Pro toolbar, select Inventory and press Add New Item.
- 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*)

Stock Locater 73	33.			Des	cription \$5.00 Off Coupon	
Vendor Item # 73	33		Su	b-Des	cription	
	Non-De	crementing Item	ı	Ec	lit UPC	•
Unit of Measure	Ea - E	ach	•			
	Main			Addit	ional Information	Messages
Cost/Price			_			
Current Cost	(0.00 Mar	gin 0.00	%	Tax Code Non Ta	axable 🚽 Volumetric Tax \$
Actual Cost	(0.00 Marl	kup	%	Find Vendor	
List Price		5.00			AltVend	
Sell Price					Dept Co	ode DeptSub Dept Class
					Find Dept 086.000	.000 Dollar Discount
Ordering Informat	tion					
On Hand	0	Maximum	1			
On Order	0	Minimum	0			
Qty / Pack	1	Has Sold	No			
Re-Order	No	Last Sold				

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Stock Locater 73 Vendor Item # 73	3. 3		Descript Sub-Descript	tion \$5.00 Off C	oupon	
	Non-Decrementi	ng Item	Edit UP	c	•	
Unit of Measure	Ea - Each		•			
	Main		Additional	Information	Messag	ies
Pricing Options Price Le	vels		Food Stamp	No	Mix 'n Match Code	View
Promo Pr Quantity F	rices Prices	s Sell by D	Sell by Weight ollar Amount	No	Item Link to SL	Edit
Kit Item		Disco	ounts Allowed	No	Stock Link to SL	Edit
C Kit Add K	□ Kit Plus it	Non E	Web Enabled Decrementing	No Yes	Add Picture	
Matrix Root	Matrix Item	Sign	FSA Eligible No	-	Remove	
View Ma	trix	Con	nmissionable	Yes	Picture	
Serialized No	View <u>S</u> erialized		Verify Age	years		

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*)

PriceO	PriceCheck Quantity Item Name					Hot Key	s Op	en Dept Op	cap Softwa	ptions Tend	ler Remark
Qty 1 1	Item ID coke-backpackbl 733	Description Backpack Coca-Cola Backup \$5.00 Off Coupon	Price 30.00 -5.00	Total 3(-{	<u>•</u> 0.00				CAPSide	8	
						\$1 \$20	\$5 \$5	5 \$10 0 \$100	Exact Change	\$.75 Off Coupon \$5.00 Off Coupon	Dollar Off Coupon \$10.00 Off Coupon
2 Item	(\$)					Cash		Check	Credit Card	Debit	Gift Card
Sales	Pers Printer ON	Sub Total Tax		25. 1.	.00 .56	Gift Ce Online O	rt F rder	Food Stamp	ruserdy	Гаура	F3A
		Total		26.	56	Pack *		Single /			Help

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)*

CAP Software Department Detail Report From 11/1/2012 To 11/1/2012											
Department	Sub Dept.	Class	Dept Code	Description	Quantit	Price	Cost	Profit\$	Profit	S/L	ItemID
DOLLAR DISCOUR	•		086.000.000	Dollar off	1.0	-1.00	0.00	-1.00	100.0	732.	732
			086.000.000	\$5.00 Off Coupon	4.0	-20.00	0.00	-20.00	100.0	733.	733
	Dept Total				5	-21.00	.00	-21.00	100.00		

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 \rightarrow Configuration \rightarrow 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**.
- 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)

Department	Sub-Department Class				
085	003 000				
Discount %	- Discount 20%				
Sub Department					
Discount 20%					
Tax Code	Profit Margin % ▼ 20				
Age for Sales Enter Age	of Restricted Products Years				
Sales Commissi (this overrides o	ion Rate for eligible Employees commission set on Sales Code)				
NOTE: An entry of 0% means no commission will be paid on any item in this Department. Values set at Dept Level will be applied to Sub-Depts and Classes					
F1 Help	F10 Accept Esc Cancel				

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*)

<u>10% Off</u>	<u>15% Off</u>
<u>Coupon</u>	<u>Coupon</u>
<u>20% Off</u>	<u>25% Off</u>
<u>Coupon</u>	<u>Coupon</u>

Inventory – Percentage Discount

- 1. In the SellWise Pro toolbar, select Inventory and press Add New Item.
- 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.
- 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)*

	4		l	Description	20%	oupon			
Vendor Item # 73	57		Sub-	Description					
	Non-Decrei	nenting Item		Edit UPC			-		
Jnit of Measure	Ea - Each	1	•						
	Main		A	dditional Info	ormation	Ì		Messag	jes
Cost/Price									
Current Cost	0.00	Marg	in 9	%	Tax Code	Non Taxal	ole 🚽	Volumetric Ta	ax \$
Actual Cost	0.00	Marku	gi gi	% F	ind Vendor				
List Price	0.00	-	•		AltVend				
Sell Price					, action d	Dept Code	DeptSu	ub Dept (Class
					Find Dept	085.003.000	Discount %	6 - Discount 20)%
Ordering Informat	tion				Depos	its 083.0	00.000		
On Hand	0	Maximum	1			unt % 085	5.000.000	01.000	
On Order	0	Minimum	0		 ─Discount 10% 085.001.000 ─Discount 15% 085.002.000 ─Discount 20% 085.003.000 				
Qty / Pack	1	Has Sold	No						
Re-Order	No	ast Sold			Dollar	Discount	086.000.	000	
Stock Locater 7: Vendor Item # 7:	31. 31	monting Itom	Sul	Descriptio	on 20% Off	f Coupon			
Stock Locater 7: Vendor Item # 7: Jnit of Measure	31. 31 <mark>Non-Decre</mark> Ea - Eac	menting Item	Sul	Descriptio b-Descriptio UPC(s	on 20% Off on s)	f Coupon		×	
Stock Locater 7: /endor Item # 7: Init of Measure	31. 31 <mark>Non-Decre</mark> Ea - Eac <i>Main</i>	menting Item	Sul	Descriptio b-Descriptio UPC(s Additional II	on 20% Off on s)	f Coupon		• Met	ssages
Stock Locater 7: Vendor Item # 7: Init of Measure Pricing Options	31. 31 <mark>Non-Decre</mark> Ea - Eac <i>Main</i>	menting Item	Sul	Descriptio b-Descriptio UPC(s <u>Additional Ir</u>	on 20% Off on s)	f Coupon		• Me:	ssages
Stock Locater 7: Vendor Item # 7: Init of Measure Pricing Options Price Le	31. 31 Non-Decre Ea - Eac <i>Main</i>	menting Item	Sul T Food S	Descriptio b-Descriptio UPC(s <u>Additional In</u> Stamp	on 20% Off on s) nformation No	f Coupon	Mix 'n M	- Me: latch Code	ssages
Stock Locater 7: Vendor Item # 7: Unit of Measure Pricing Options Price Le Promo F	31. 31 Non-Decre Ea - Eac Main	menting Item	Sul - Food S Sell by W	Descriptio b-Descriptio UPC(s Additional In Stamp	on 20% Off on s) nformation No No	f Coupon	Mix 'n M reak Pack	Me: latch Code	ssages Vi
Stock Locater 7: Vendor Item # 7: Init of Measure Pricing Options Price Lo Promo F	31. Non-Decre Ea - Eac Main evels Prices	menting Item	Sul Food S Sell by W I by Dollar Am	Description b-Description UPC(st Additional In Stamp Veight	on 20% Off on s) nformation No No	f Coupon	Mix 'n M reak Pack Item	Met latch Code t Link to SL Link to SL	ssages Vi
Stock Locater 7: Vendor Item # 7: Jnit of Measure Pricing Options Price Le Promo P Quantity Kit Item	31. 31 Non-Decre Ea - Eac Main evels Prices	menting Item	Sul Food S Sell by W I by Dollar Am Discounts All	Description b-Description UPC(st Additional In Stamp Veight hount	on 20% Off on s) nformation No No	f Coupon	Mix 'n M reak Pack Item Stock	Me: latch Code t Link to SL Link to SL Link to SL	ssages Vi
Stock Locater 7: Vendor Item # 7: Unit of Measure Pricing Options Price Le Promo F Quantity Kit Item	31. 31 Non-Decre Ea - Eac Main evels Prices Prices	ementing Item h	Sul Food S Sell by W I by Dollar Am Discounts All Web En:	Description b-Description UPC(st Additional In Stamp Veight hount lowed abled	on 20% Off on s) nformation No No No	f Coupon	Mix 'n M reak Pack Item Stock	Met latch Code t Link to SL Link to SL Link to SL	ssages Vi
Stock Locater 7: Vendor Item # 7: Init of Measure Pricing Options Price Le Promo F Quantity Kit Item	31. 31 Non-Decre Ea - Eac Main evels Prices Prices Kit Plus Kit	menting Item	Sul Food S Sell by W I by Dollar Am Discounts All Web En	Description b-Description UPC(st Additional In Stamp Veight hount lowed abled	on 20% Off on s) nformation No No No No	f Coupon	Mix 'n M reak Pack Item Stock	Met latch Code t Link to SL Link to SL Link to SL	ssages Vi
Stock Locater 7: Vendor Item # 7: Unit of Measure Pricing Options Price Le Promo P Quantity Kit Item Kit Item Kit Add F	31. 31 Non-Decre Ea - Eac Main evels Prices Prices Cit Plus Kit Plus	menting Item h Sell	Sul Food S Sell by W I by Dollar Am Discounts All Web End Non Decreme	Description b-Description UPC(st Additional In Stamp Veight nount lowed abled enting	on 20% Off on s) nformation No No No Yes	f Coupon	Mix 'n M reak Pack Item Stock Add Picture	Mean Mean Aatch Code t Link to SL Link to SL Link to SL	ssages Vi
Stock Locater 7: Vendor Item # 7: Init of Measure Pricing Options Price Le Promo F Quantity Kit Item Kit Item Kit Add F Matrix Root	31. 31 Non-Decre Ea - Eac Main evels Prices Prices Kit Plus Kit Plus Kit Plus	menting Item	Sul Food S Sell by W I by Dollar Am Discounts All Web En Non Decreme FSA El	Description b-Description UPC(st Additional In Stamp Veight hount lowed abled enting	on 20% Off on s) nformation No No No No Yes	f Coupon	Mix 'n M reak Pack Item Stock Add Picture Remove	Met latch Code t Link to SL Link to SL Link to SL	ssages Vi
Stock Locater 7: Vendor Item # 7: Init of Measure Pricing Options Price Le Promo P Quantity Kit Item Kit Item Kit Add F Matrix Root View Ma	31. 31 Non-Decre Ea - Eac Main evels Prices Prices Kit Plus Kit Plus Kit Plus Kit Plus	menting Item h Sell	Sul Food S Sell by W I by Dollar Am Discounts All Web En Non Decreme FSA El Sign. Required	Description b-Description UPC(st Additional In Stamp Veight nount lowed abled enting ligible d FSA	on 20% Off on s) No No No Yes No	f Coupon	Mix 'n M reak Pack Item Stock Add Picture Remove Picture	Me: latch Code t Link to SL Link to SL Link to SL	ssages Vi
Stock Locater 7: Vendor Item # 7: Jnit of Measure Pricing Options Price Le Promo P Quantity Kit Item Kit Add F Matrix Matrix Root View Ma	31. Non-Decre Ea - Eac Main evels Prices Prices Kit Plus Kit Plus Kit	menting Item h Sell	Sul Food S Sell by W I by Dollar Am Discounts All Web End Non Decreme FSA El Sign. Required Commissio	Description b-Description UPC(st Additional In Stamp Veight nount lowed abled enting ligible d FSA nable	on 20% Off on s) nformation No No No No Yes No Yes	f Coupon	Mix 'n M reak Pack Item Stock Add Picture Remove Picture	Met atch Code Link to SL Link to SL	ssages Vi
Stock Locater 7: Vendor Item # 7: Jnit of Measure Pricing Options Price Le Promo F Quantity Kit Item Kit Add H Matrix Matrix Root Serialized Item Serialized No	31. 31 Non-Decre Ea - Eac Main evels Prices Prices Kit Plus Kit Plus Kit Plus View Serializa	ementing Item h Sell	Sul Food S Sell by W I by Dollar Am Discounts All Web En Non Decreme FSA El Sign. Required Commissio Verif	Description b-Description UPC(st Additional In Stamp Veight hount lowed abled enting ligible d FSA nable y Age	on 20% Off on s) nformation No No No Yes No Yes years	f Coupon	Mix 'n M reak Pack Item Stock Add Picture Remove Picture	Mes latch Code : Link to SL Link to SL	ssages Vi

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*)

PriceCheck Quantity Item Name					Keys Open Dept Operations Exceptions Tender Remark CAP Software					
								CAPISvine		
Qty	Item ID	Description	Price	Total <u></u>						
1	coke-backpackbl	Coca-Cola Backup	30.00	24.00				Series of		
		20% Off Coupon	.00	.00				PRO 8	U	
					\$1	\$5	\$10		10% Off Coupon	15% Off Coupon
					\$20	\$50	\$100	Exact Change	20% Off Coupon	25% Off Coupon
					Cash		Check	Credit Card) Debit	Gift Card
2 Item	l(s)	Sub Total		24.00	Gift Cer	t Foo	od Stamp	Pulse Pay	Paypal	FSA
Sales HELL	Pers Printer ON	Тах		1.50	Online Or	der				
Disc	ounted Sale	Total		25.50	Pack *	Sir	ngle /			Help

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.
- 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	Sub Dept.	Class	Dept Code	Description	Quantit	Price	Discount	Profit\$	Profit	S/L ItemID
DISCOUNT %	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				.00	8.34		.00%	
	D: 100			0001 011 0	4.0	0.00	6.00			704 704
	Discount 20		085.003.000	20% Off Coupon	1.0	0.00	6.00		.0	/31. /31
		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)

Sales								
S	Sales Summary							
Tran	Transaction Summary							
Tra	ansaction Detail							
	Tax							
	Tender							
	Credit Cards							
	Cash Drawer							
	Discounts							
	Summary							
	Promo Price Discounts							
	Quantity Price Discounts							
	Percentage Coupons							
	Dollar Discounts							
	Mix 'n Match Discounts							

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 10% Discount 15% Discount 20% Discount 25% Discount 0% Discount Total Sale Discounts	Qty 2 1 2 1 0 6	Discount % 10% 15% 20% 25% 0%	\$ Discounts 14.39 8.34 89.10 5.00 .00 116.83
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