

DISCOUNTING SCHEMES

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OVERVIEW

Hairlink^{SQL} is able to be configured to apply discounts in a number of different manners. The scheme you choose will depend on a number of different factors. A client can receive a discount because management can assign one to the product, the client or to the quantity of product purchased. Automating discounts mean that fewer mistakes are made at the point of sale, and the providing of discounts can be regulated.

CLIENT DISCOUNTING SCHEME

The client discounting scheme is the most commonly used of the discounting schemes and it is also the simplest. If you want to set up a basic discounting scheme then this is the one to use. It will assign clients into different discounting groups that determine the discounts they receive on product and services. For example students may get a 5% discount while pensioners receive a 10% discount.

Initial Client Discount Setup

1. Click on the **'Options'** menu and then click **'Setup'**.
2. Click on the **'Product'** button and then click on the **'2:Discounts'** tab.
3. Place a tick in **'Use Client Based Discount Scheme'**.
4. Under **'Use Client Based Discount Scheme'** enter the names of the discounting levels you wish to use.

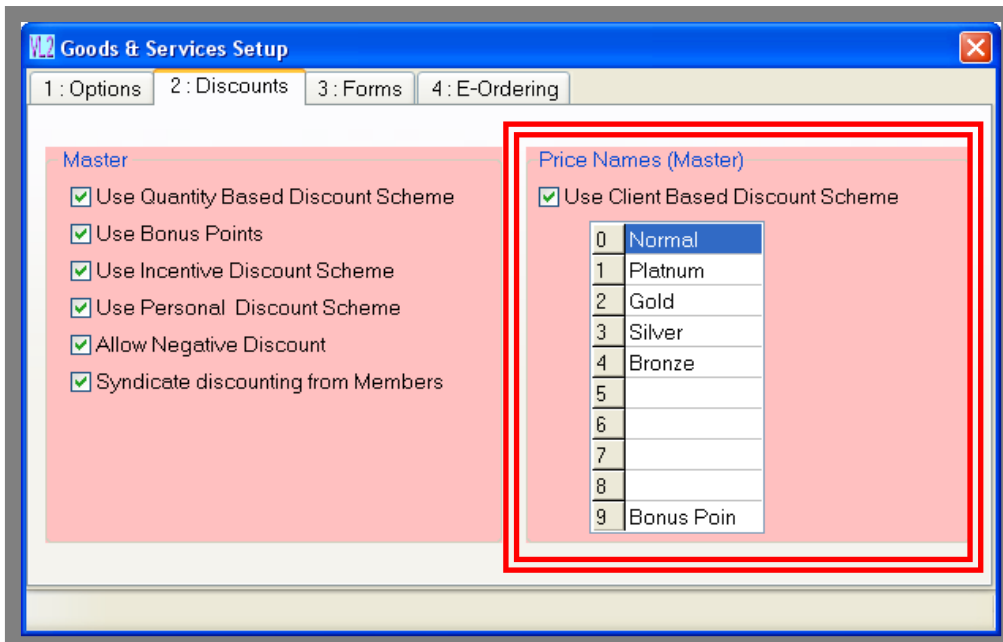


Fig. 8 - 1

Assigning Discounts to Products

1. Open the product record you wish to give a discount to.
2. Click on the **'4: Discount'** tab.
3. In the Client Discounts section, enter the Client Discount amounts you wish each client discount category to receive for this product. You can enter the client discount percentage in the **'Disc Per'** column or alternatively in the **'Disc Price'** column enter the actual price you wish to charge for the product once the discount has been taken into account. Whichever column you choose to edit, the other column will be automatically updated.
4. Click on the tick button to save the discounts.

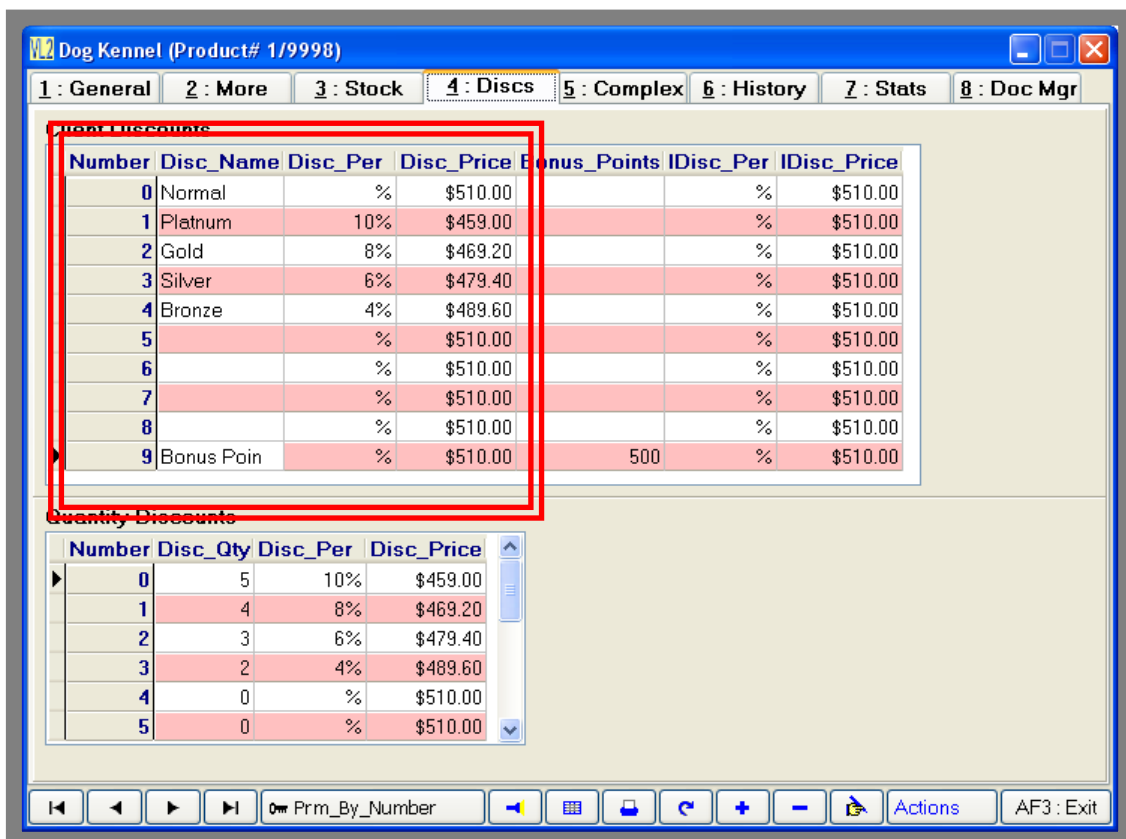


Fig. 8 - 2

Assigning Clients to Discount Levels to Clients

1. Open the client record you wish to assign to a discount level.
2. Click on the '3: Financial' tab.
3. Choose the Discount category you would like this customer classified under for client discounts by selecting a discount category for 'Disc on Svc', 'Disc on Retail' and 'Disc on Mat'.



NOTE: Setting the incentive discount category here will change the incentive discount, bonus point and client discount category they are in. You cannot be in the Pensioner incentive discount category for services and be in the Normal bonus point category for services as well.

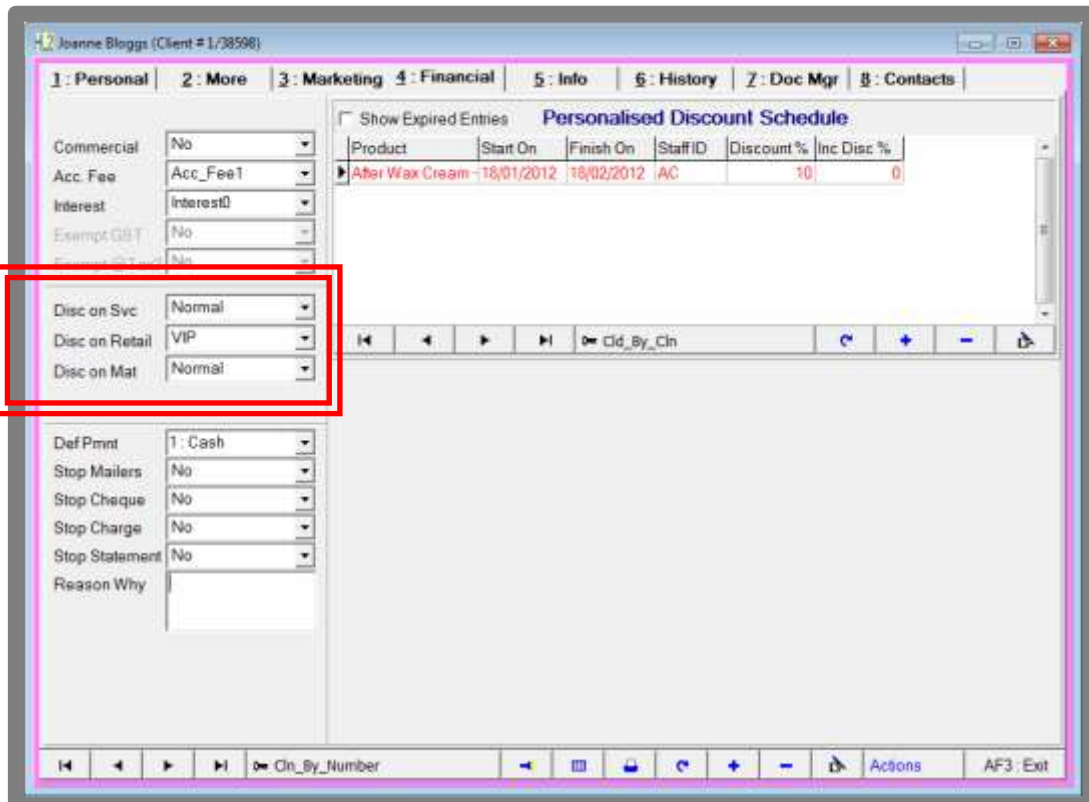


Fig. 8 - 3

SETTING UP QUANTITY BASED DISCOUNTS

Quantity based discounts are used when you want to give clients discounts based amount the amount of a product they buy. For example if a client buys five Shampoo bottles they can receive a \$5 discount off each bottle, if they buy ten Shampoo bottles they can receive a \$10 discount off each bottle.

Initial Quantity Based Discount Setup

1. Click on the **'Options'** menu and then click **'Setup'**.
2. Click on the **'Product'** button.
3. Click on the **'2:Discounts'** tab.
4. Place a tick in **'Use Quantity Based Discount Scheme'**.

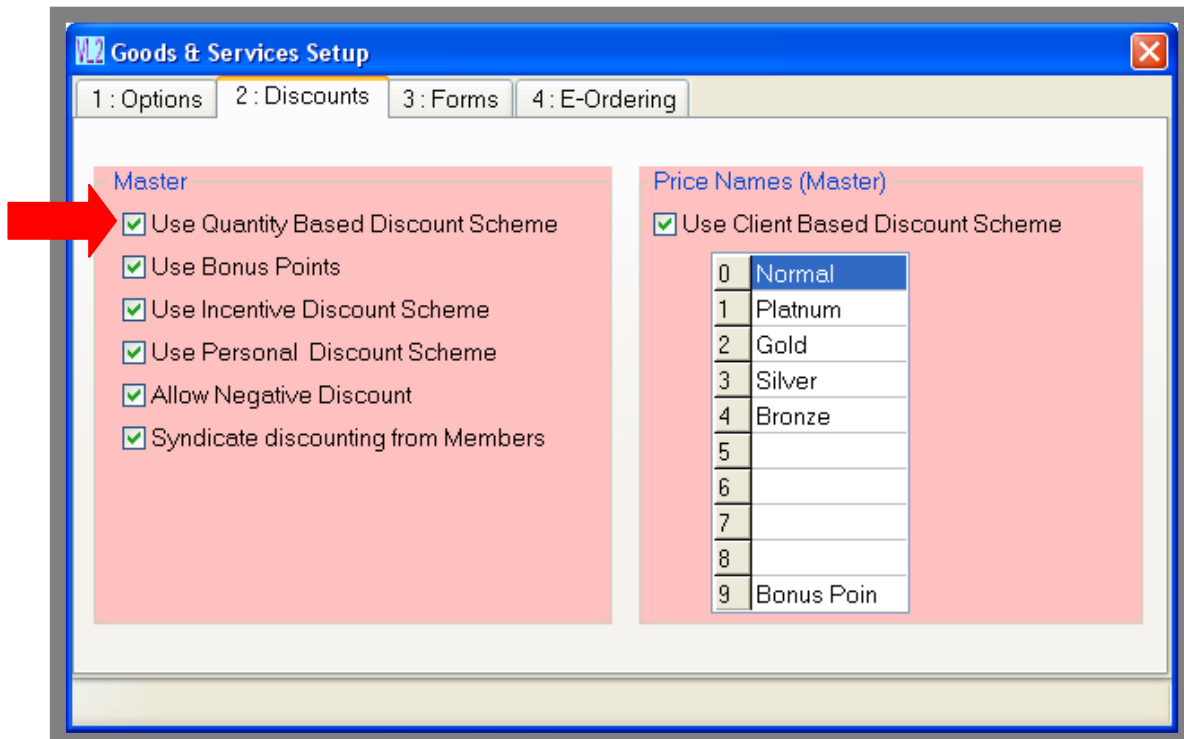


Fig. 8 - 4

Assigning Quantity Based Discounts to Products

1. Open the product record you wish to give a discount to.
2. Click on the '4: Discount' tab.
3. Go to the Quantity Discounts section.
4. In the 'Disc_Qty' field enter the number of items a client must purchase to receive a discount.
5. You will now need to enter the quantity the client must purchase to qualify for the discount in the 'Disc_Qty' column. You can then either enter the discount percentage in the 'Disc_Per' column or alternatively in the 'Disc_Price' column enter the actual price you wish to charge for the product once the discount has been taken into account. Whichever column you choose to edit, the other column will be automatically updated.

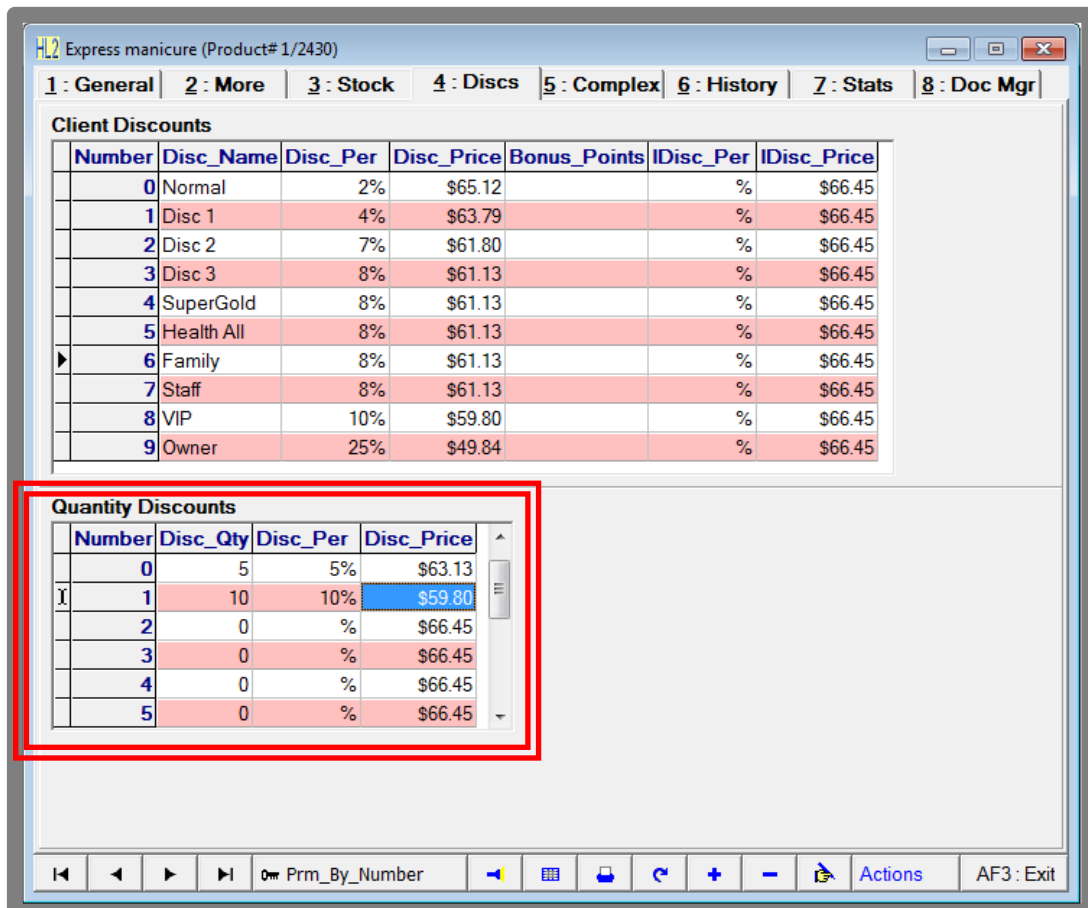


Fig. 8 - 5

SETTING UP PERSONALISED DISCOUNTS

Personalised discounts are used to give one client a discount on one particular product when they purchase it at billing. You can set the start on and finish on dates so the discount will only last for a specified period.

Initial Personalised Discount Setup

1. Click on the **'Options'** menu and then click **'Setup'**.
2. Click on the **'Product'** button.
3. Click on the **'2:Discounts'** tab.
4. Place a tick in **'Use Personal Discount Scheme'**.

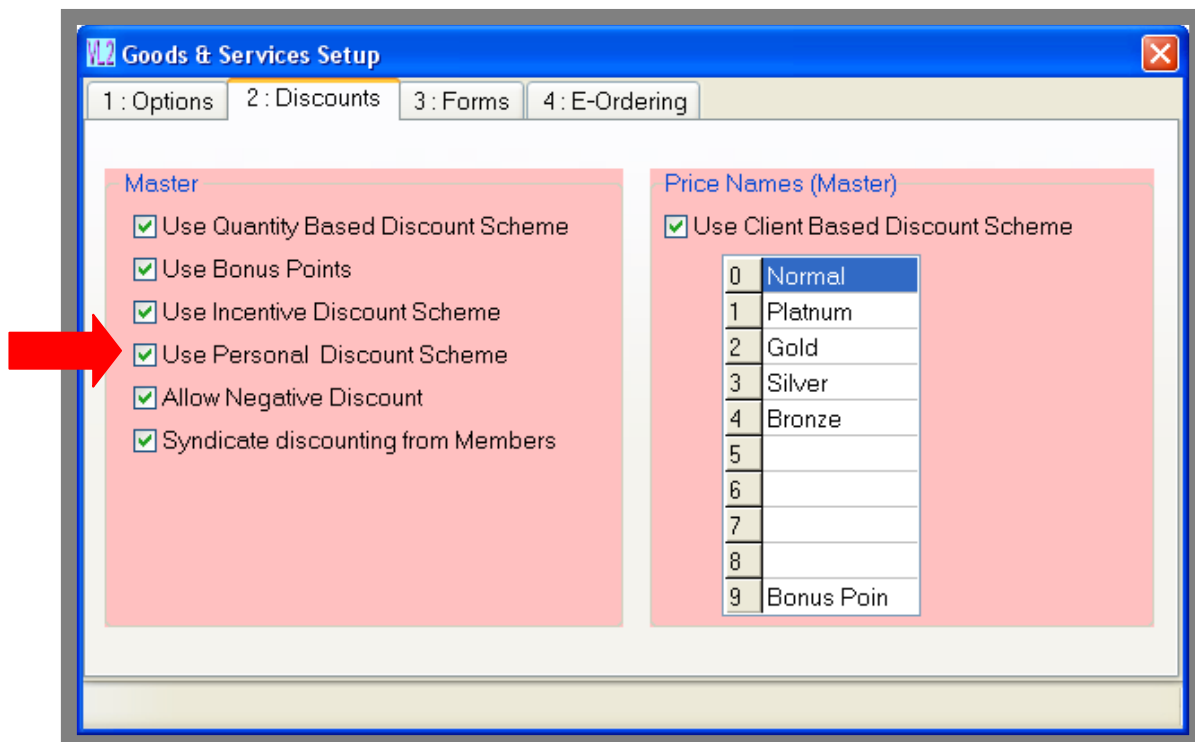


Fig. 8 - 6

Assigning Personalised Discounts to Clients

1. Open the client record you wish to assign to a discount level.
2. Click on the '3: Financial' tab.
3. Click on the '+' button in the Personalised Discount Schedule Panel.
4. Click 'OK' and a product search window will open.
5. Search for the product you wish to add to the client's personalised discount schedule.
6. The product will now be added to the client's personalised discount schedule.
7. You will now need to enter start and finish on dates, the staff id of the person who entered the discount and the discount percentage.

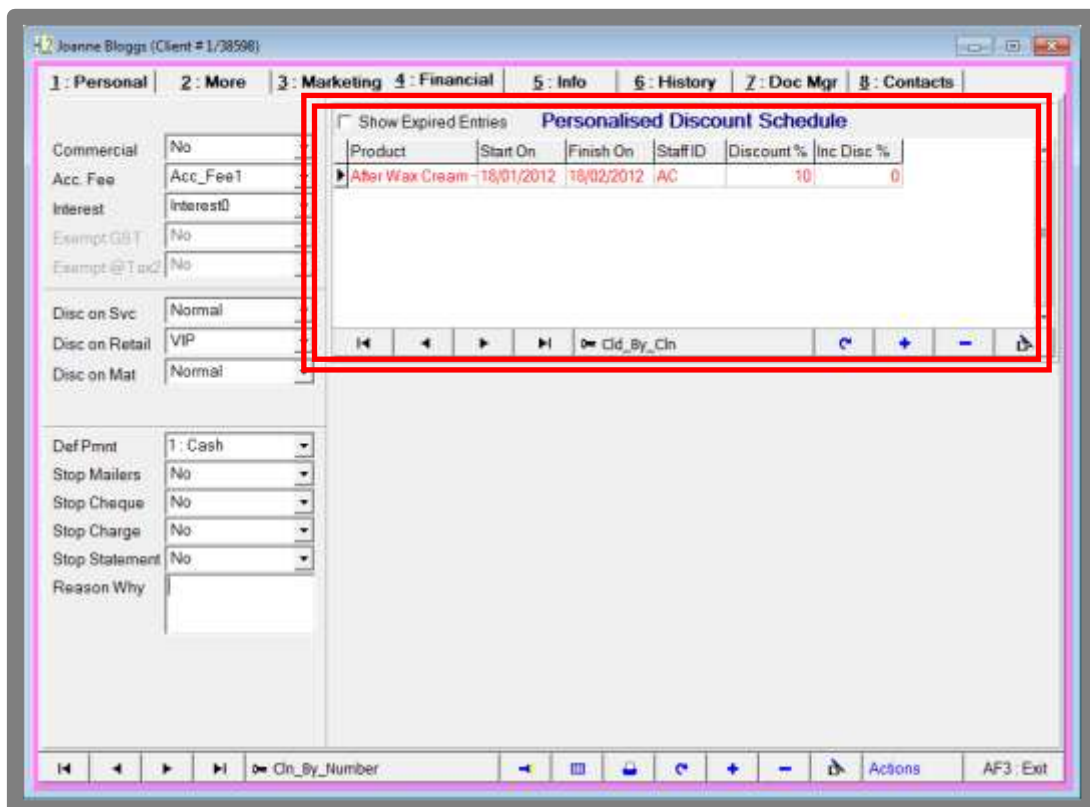


Fig. 8 - 7

USING INCENTIVE DISCOUNTS

Incentive discounting is used when you want reward clients for paying their accounts on time by giving them a discount. For example if your business has set incentive discounting to expire on the 20th of the month, and a client purchases a product with an incentive discount on the 1st of July. That client has until the 20th of August to pay for the product in full to receive the incentive discount.

Initial Incentive Discount Setup

Activating Incentive Discount

1. Click on the **'Options'** menu and then click **'Setup'**.
2. Click on the **'Product'** button.
3. Click on the **'2:Discounts'** tab.
4. Place a tick in **'Use Incentive Discount Scheme'**.

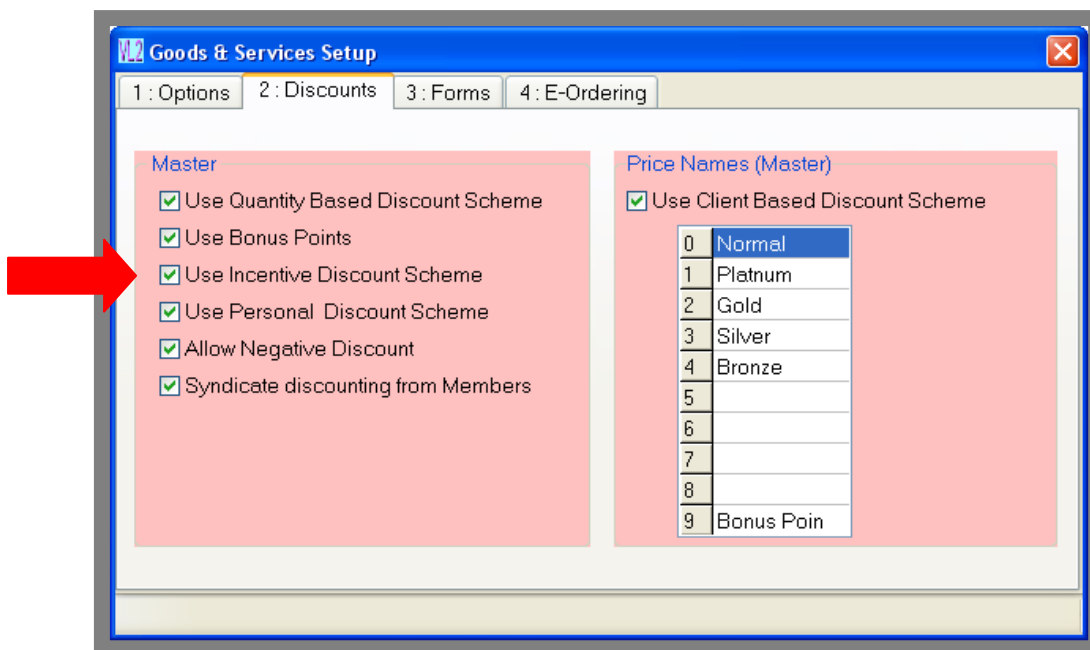


Fig. 8 - 8

Make Incentive Discount Available on Cash Bills

Incentive discount can also be made available on cash bills. Therefore giving clients an incentive to pay in cash rather than charging to account to obtain the discount.

1. Click on the **'Options'** menu and then click **'Setup'**.
2. Click on the **'Bills'** button.
3. Click on the **'1:Master/Site'** tab.
4. Place a tick in **'Make Incentive Discount Available for Cash Bills'**.

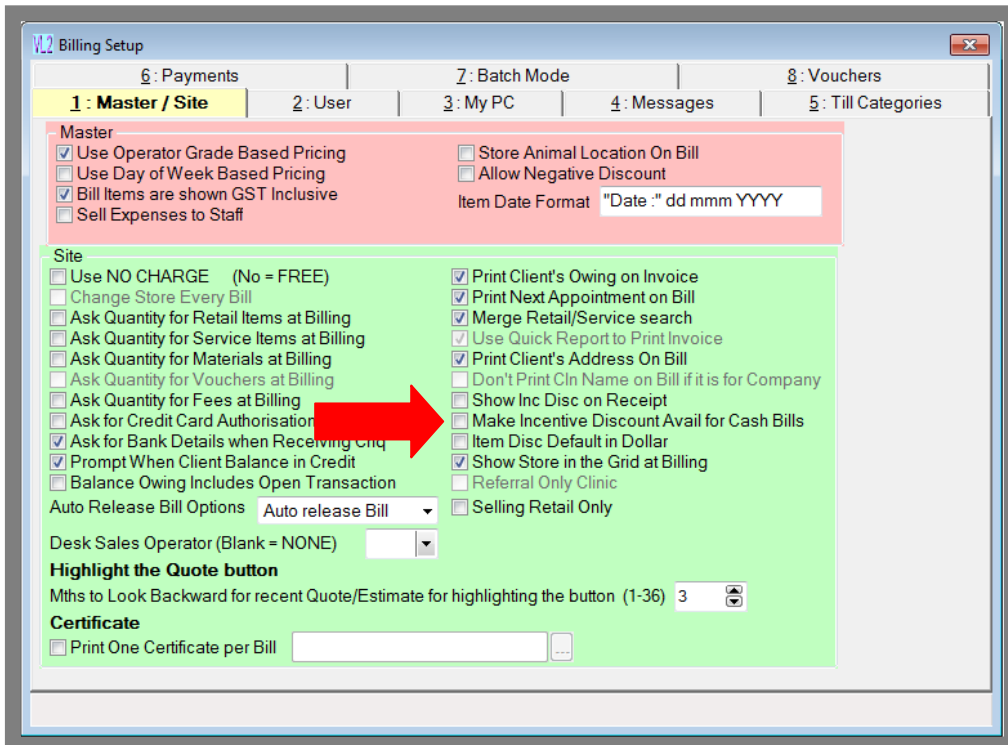


Fig. 8 - 9

Choosing Day of Month for Incentive Discount to Expire

1. Click on the **'Options'** menu and then click **'Setup'**.
2. Click on the **'Finance'** button.
3. Click on the **'6:Statements'** tab.
4. Enter the day you wish incentive discount to expire in the **'Day ID expires on'** field.

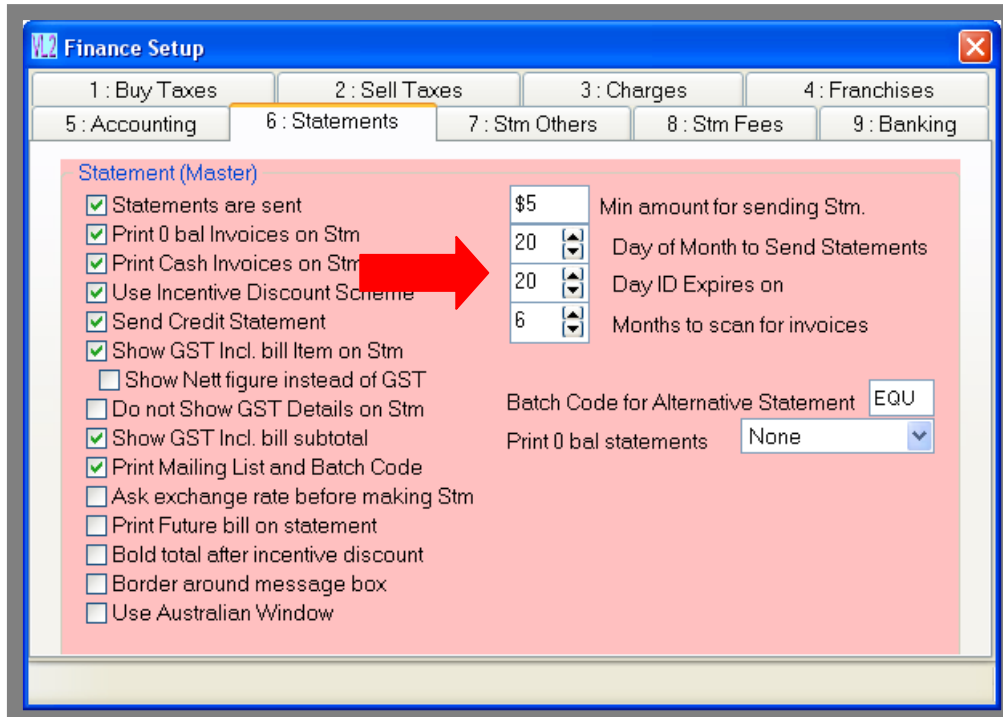


Fig. 8 - 10

Assigning Incentive Discounts to Products

1. Open the product record you wish to give a discount to.
2. Click on the '4: Discount' tab.
3. In the Client Discounts section, enter the Incentive Client Discount amounts you wish each client discount category to receive for this product. You can enter the discount percentage in the 'IDisc Per' column or alternatively in the 'IDisc Price' column, enter the actual price you wish to charge for the product once the incentive discount has been taken into account. Whichever column you choose to edit, the other column will be automatically updated.
4. Click on the tick button to save the discounts.

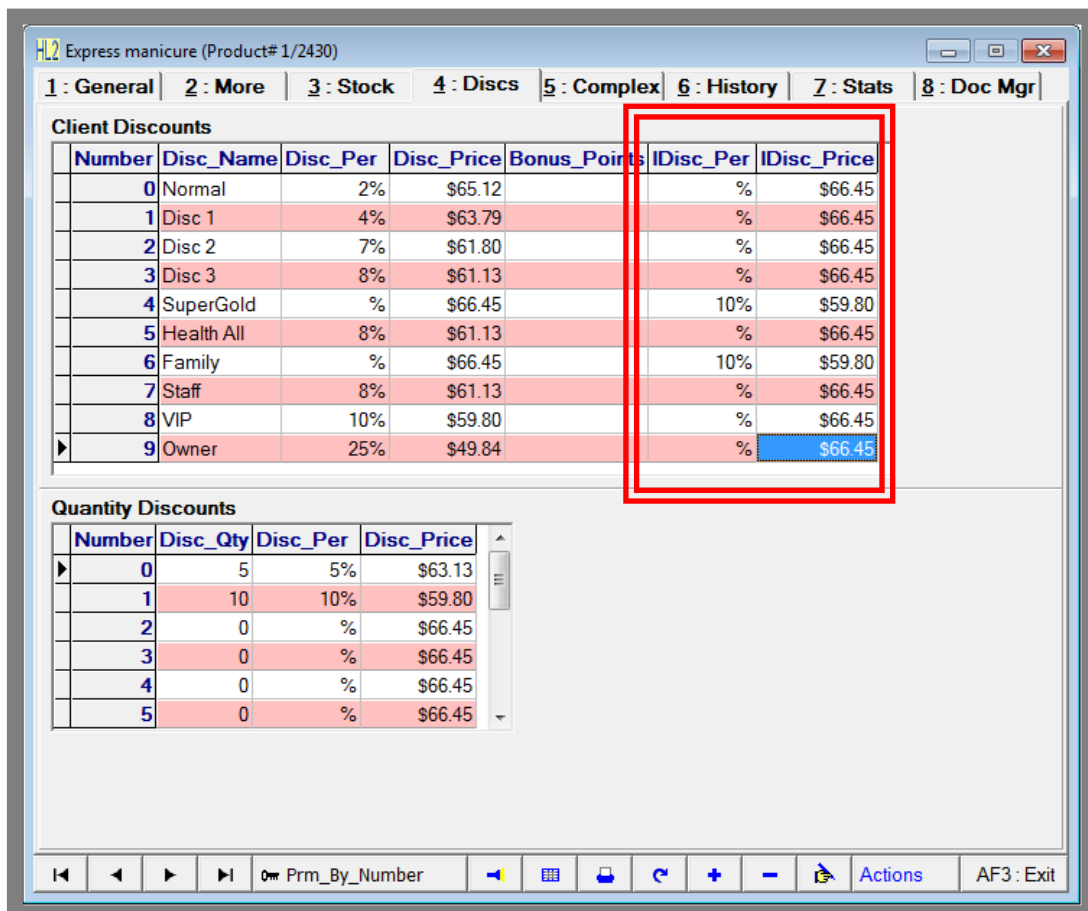


Fig. 8 - 11

Assigning Incentive to Discount Levels to Clients

1. Open the client record you wish to assign to a discount level.
2. Click on the '3: Financial' tab.
3. Choose the Discount category you would like this customer classified under for client discounts by selecting a discount category for 'Disc on Svc', 'Disc on Retail' and 'Disc on Mat'.



NOTE: Setting the incentive discount category here will change the incentive discount, bonus point and client discount category they are in. You cannot be in the Pensioner incentive discount category for services and be in the Normal bonus point category for services as well.

Joanne Bloggs (Client # 1/38598)

1: Personal | 2: More | 3: Marketing | 4: Financial | 5: Info | 6: History | 7: Doc Mgr | 8: Contacts

Commercial: No
Acc. Fee: Acc_Fee1
Interest: Interest0
Exempt GST: No

Disc on Svc: Normal
Disc on Retail: VIP
Disc on Mat: Normal

DefPrnt: 1: Cash
Stop Mailers: No
Stop Cheque: No
Stop Charge: No
Stop Statement: No
Reason Why:

Product	Start On	Finish On	StaffID	Discount %	Inc Disc %
Alter Wax Cream	18/01/2012	18/02/2012	AC	10	0

Clk_By_Cln

Clk_By_Number

Actions AF3: Ext

Fig. 8 - 12

Viewing Incentive Discounts Available

1. Search for the client and open their client record.
2. Click on the '5:Info' tab.
3. Click on the '0: Incen Disc' tab.
4. The incentive discount tab is split into five columns displaying current and historical data:

St:	Refers to the store number if you have multiple stores.
Month:	Refers to the month the incentive discount is offered in.
ID Offered Next Month:	Refers to how incentive discount the client has accumulated to be redeemed next month.
ID Available this Month:	Refers to how much incentive discount the client can redeem this month.
ID Taken This Month:	Refers to how much incentive discount has been redeemed by the client this month.

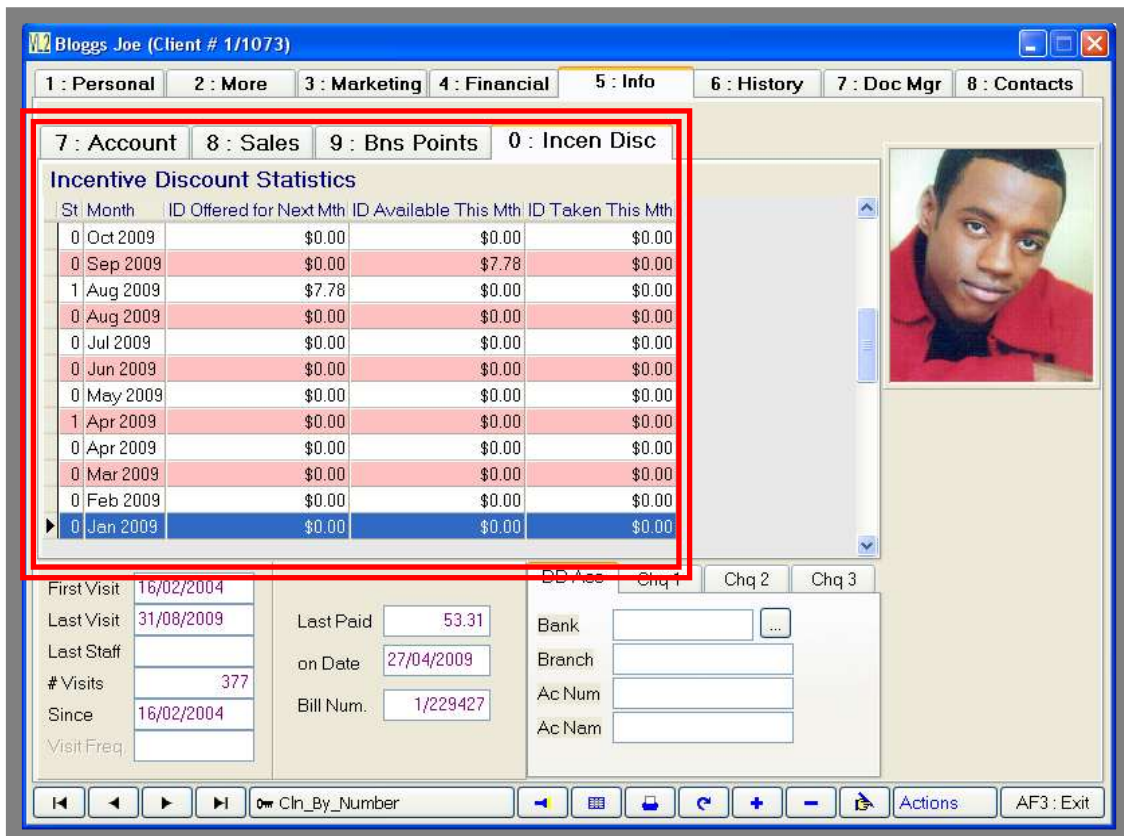


Fig. 8 - 13

ADVANCED DISCOUNT SETUP OPTIONS

Allow Negative Discount

If Allow Negative Discount is **on** users can enter a negative discount for product items. For example, if a client had a '-10%' discount on a \$10 product they would end up paying \$11 for that product at billing. **USE THIS FEATURE WITH CAUTION.**

1. Click on the '**Options**' menu and then click '**Setup**'.
2. Click on the '**Product**' button and then click on the '**2:Discounts**' tab.
3. Place a tick in '**Allow Negative Discount**'.