



How-To: Create Discounts— a condensed manual

## How-To: Create Discounts

Managers Menu > Discounts Gratuity Maintenance

### 10% off a Check

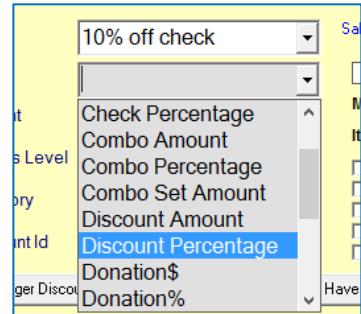
Please use this example to create any percentage amount off of a check. Replace the “10” with any desired number.

From the setup screen:

1. Type in a descriptive **name** for your discount – please be aware that this is the discount name that will appear on the customer’s receipt.

Name	10% off check
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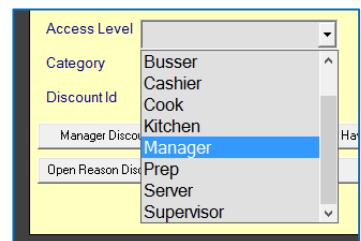
2. Select the dropdown next to **Type** and choose a discount type that best describes your discount name. To take off a percentage, choose the Type of *Discount Percentage*.



3. Next to **Amount**, type in the appropriate percentage amount – in this example, type in 10 to discount the check total 10 percent.

Name	10% off check
Type	Discount Percentage
Amount	10

4. Next to **Access Level**, decide who should be able to apply this discount – usually you will only allow an assistant manager or higher to apply discounts in order to prevent unauthorized discounts from being applied to checks.

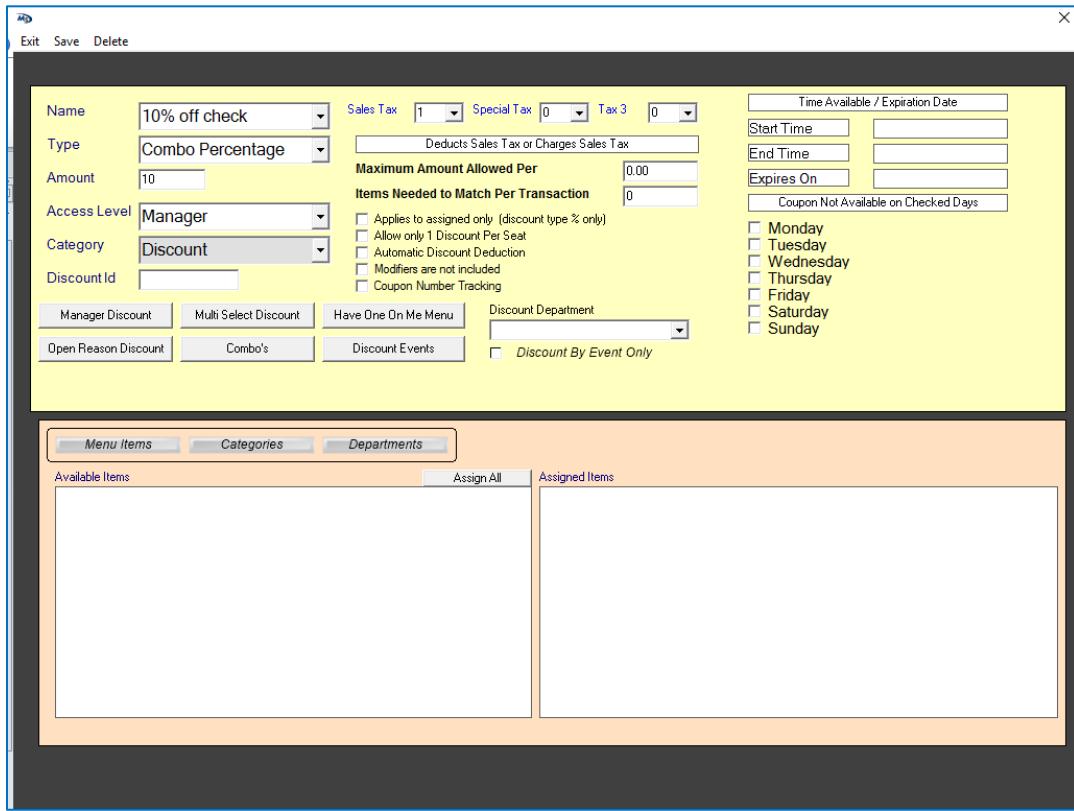


5. Choose the best category that describes what you just made – for example, it could be a coupon, discount, service charge, etc.
  - a. In this example, choose the category
  - b. **Discount**.

Name	10% off check
Type	Discount Percentage
Amount	10
Access Level	Manager
Category	Discount
Discount Id	Department
	Discount
	Frequent Diner
	Gratuity
	Issue Coupon
	Member
	Non Sales Discount
	Service Charge

6. Select **Save** in the top left corner
7. After selecting Save, either continue adding discounts or Exit the screen.

Completed setup should look like this:



To only apply the discount to a select number of menu items on a check, select the option **Multi Select Discount** (it will auto insert 100 in the Items Needed to Match Per Transaction area).

## Open Dollar Amount off a check

An Open Amount discount will allow you to discount a check by any dollar amount. When you touch this discount name on the order screen, it will prompt a keypad to type in the desired amount.

### From the setup screen:

1. Type in a descriptive name for your discount – you will be prompted for a reason (reason will be your Discount Name on the receipt) when using the *Open Amount* type.

Name	Open \$
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2. Select the dropdown next to **Type** and choose a discount type that best describes your discount name. To take off an open amount, choose the Type of *Open Amount*.

Name	Open \$
Type	Open Amount

3. Leave the **Amount** blank since you will put in a custom amount on the order screen.

Name	Open \$
Type	Open Amount
Amount	.00

4. Next to **Access Level**, decide who should be able to apply this discount – usually you will only allow an assistant manager or higher to apply discounts in order to prevent unauthorized discounts from being applied to checks.

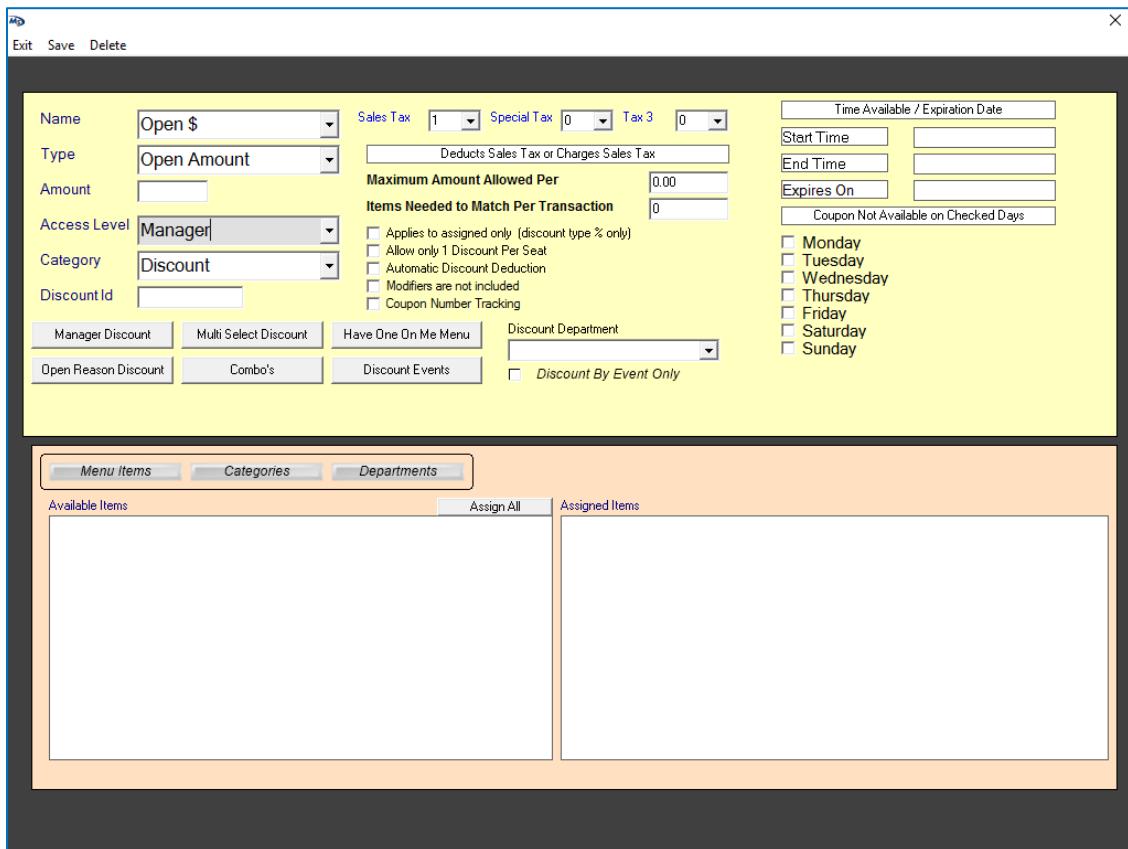
Name	Open \$
Type	Open Amount
Amount	.00
Access Level	Manager
Category	Busser
Discount Id	Cashier
	Cook
	Kitchen
Manager Discou	Manager
Open Reason Discou	Prep
	Server
	Supervisor

5. Choose the best category that describes what you just made – for example, it could be a coupon, discount, service charge, etc.  
In this example, choose the category **Discount**.

Category	Discount
Discount Id	0

6. Select **Save** in the top left corner
  - a. After selecting Save, either continue adding discounts or Exit the screen.

Reference the screenshot below for proper setup.



## Open Percentage off a check

An Open Percentage discount will allow you to discount a check by any percentage amount on the total check. When you touch this discount name on the order screen, it will prompt a keypad to type in the desired percent.

### From the setup screen:

1. Type in a descriptive **name** for your discount – you will be prompted for a reason (reason will be your Discount Name on the receipt) when using the *Open Percentage* type.

Name	Open %
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2. Select the dropdown next to **Type** and choose a discount type that best describes your discount name. To take off an open amount, choose the Type of *Open Percentage*.

Name	Open %
Type	Open Percentage
Amount	Gratuity Minimum Amount Minimum Percentage Open Amount Open Gratuity
Access Level	Open Percentage
Category	Open Amount Open Gratuity
Discount Id	Open Percentage Percentage Prompt Set Price
Manager Discount	Open Reason Discount Combo's

3. Leave the **Amount** blank since you will put in a custom percentage on the order screen.

Name	Open %
Type	Open Percentage
Amount	

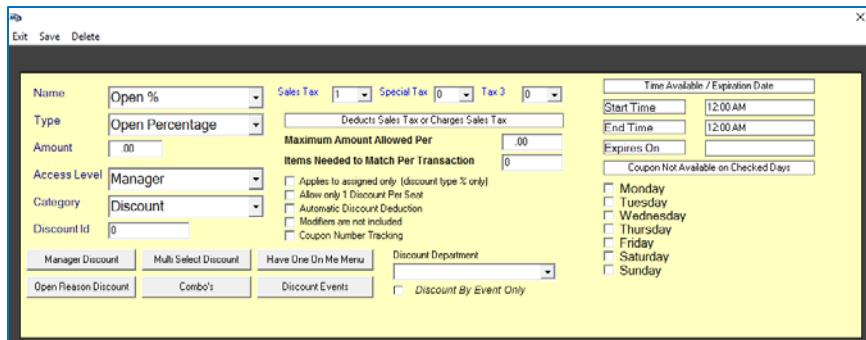
4. Next to **Access Level**, decide who should be able to apply this discount – usually you will only allow an assistant manager or higher to apply discounts in order to prevent unauthorized discounts from being applied to checks.

Name	Open %
Type	Open Percentage
Amount	
Access Level	Manager

5. Choose the best category that describes what you just made – for example, it could be a coupon, discount, service charge, etc.
  - a. In this example, choose the category **Discount**.

Access Level	Manager
Category	Discount
Discount Id	Department Discount
Manager Discount	Frequent Diner Gratuity Issue Coupon Member Non Sales Discount Service Charge
Open Reason Discount	

6. Select **Save** in the top left corner



## Gratuity on a check

Gratuity, also known as a service charge, is programmed in the discounts setup area. A gratuity amount can be computed as a percentage of either the pre-tax or post-tax check amount.

### From the setup screen:

1. Type in a descriptive **name** for your gratuity— this name will appear on the guest check.

Name	18% Gratuity
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2. Select the dropdown next to **Type** and choose a discount type that best describes your discount name. To take off an open amount, choose the Type of *Open Percentage*.

Name	18% Gratuity
Type	Gratuity
Amount	Combo Percentage
Access Level	Combo Set Amount
Category	Discount Amount
Discount Id	Discount Percentage
	Donation\$
	Donation%
	Gratuity
	Manager Disc
	Minimum Amount

3. Next to **Amount**, type in the appropriate percentage that should be added to the guest check, such as 18 to add an 18% gratuity.

Name	18% Gratuity
Type	Gratuity
Amount	18

4. Next to **Access Level**, decide who should be able to apply this gratuity – usually you would allow a server or any employee to add a gratuity to a check. Based on your register settings, the system will not allow you to add a gratuity to a party of 6 or less.

Access Level	Busser
Category	Cashier
Discount Id	Cook
Manager Disc	Kitchen
Open Reason Disc	Manager
	Prep
	Server
	Supervisor

5. For a **Gratuity** charge, you must choose the category of **Gratuity** for the charge to properly report.  
In this example, choose the category **Gratuity**.

Name	18% Gratuity
Type	Gratuity
Amount	18
Access Level	Server
Category	Gratuity
Discount Id	
<input type="button" value="Manager Discount"/> <input type="button" value="Multi Select Discount"/> <input type="button" value="H"/>	

6. Select **Save** in the top left corner
7. After selecting Save, either continue adding discounts or Exit the screen.

Reference the screenshot below for proper setup.

The screenshot shows the discount setup interface in two main sections:

**Top Section (Discount Configuration):**

- Name:** 18% Gratuity
- Type:** Gratuity
- Amount:** 18
- Access Level:** Server
- Category:** Gratuity
- Discount Id:** (empty)
- Sales Tax:** 1
- Special Tax:** 0
- Tax 3:** 0
- Deducts Sales Tax or Charges Sales Tax:** (checkbox)
- Maximum Amount Allowed Per:** 0.00
- Items Needed to Match Per Transaction:** 0
- Time Available / Expiration Date:**
  - Start Time:** (empty)
  - End Time:** (empty)
  - Expires On:** (empty)
  - Coupon Not Available on Checked Days:** (checkbox)
  - Days:** Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday (checkboxes)
- Manager Discount**, **Multi Select Discount**, **Have One On Me Menu**, **Discount Department** buttons.
- Open Reason Discount**, **Combo's**, **Discount Events** buttons.
- Discount By Event Only** checkbox.

**Bottom Section (Assignment):**

- Menu Items**, **Categories**, **Departments** buttons.
- Available Items** and **Assigned Items** panes.
- Assign All** button.

# Advanced Discount Setup

## Discounting Specific Items Only

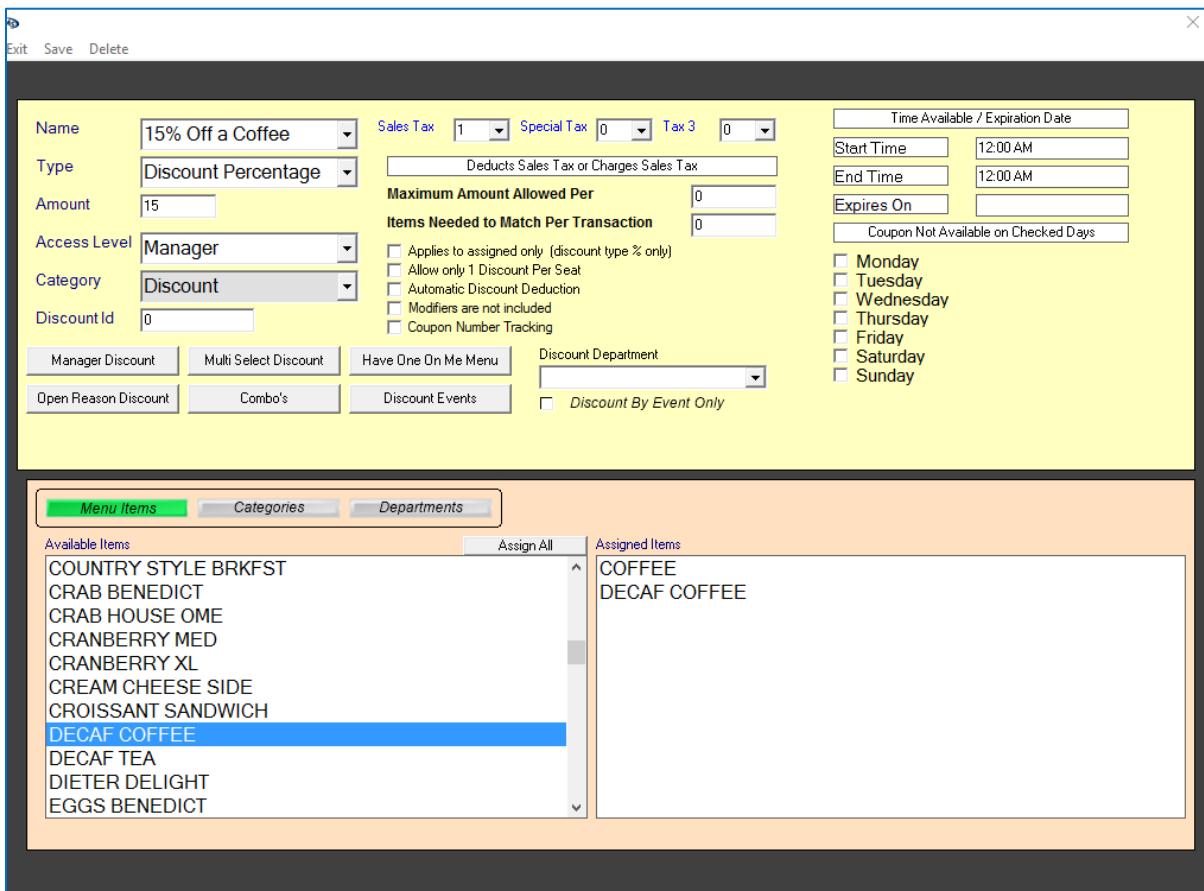
You may offer a discount that should only apply to specific items. You will create a discount the same as the above examples, but with one additional step. Please follow the steps below.

After you create your discount Name, Type, Amount, Access Level and Category, select Menu **Items**, **Categories** or **Departments**.

Only items in the Assigned Items box (white box on the bottom right of the screen) will be discounted. In this example, the discount will only apply to coffee.

1. Choose the option Menu Items so that it appears green.
2. Scroll through your items and select (left click) on all coffee items that will allow the discount.  
*If you accidentally click on the wrong menu item, select (left click) the incorrect item to delete it from the box.*
3. Once you are satisfied with your selection, **Save** the discount. You can always come back and edit it later.

Reference the screenshot below for proper setup:



## Discount only available for Specific Times or Days

12:00 AM / 12:00 AM is the default time. When you see a discount with this time, it means the discount is available 24 hours a day.

### To set a discount for only a specific time of day:

1. Create a discount using the steps above
2. Click on 12:00 AM to the left of the Start Time.
  - a. Choose the proper start time hour followed by the minutes
3. Repeat Step 2 for the End Time
4. Once you are satisfied with the times, Save the discount

Please note that this does NOT mean the discount will automatically apply during the specified time frame. If you need to discount menu items daily for Happy Hour, please follow the Happy Hour section of the *How To: Build a Menu* document.

### To set a discount for only specific days:

1. Create a discount using the steps above
2. If the discount is available 24 hours during specific days, leave the Start Time and End time at 12:00 AM.
3. Check the options next to the days that the discount is NOT available.

If you check today, your discount will not appear on the order screen and you will not be able to test it. You can leave the current day unchecked and then go back and check it later if you need to verify that the discount works correctly.

