

MicroSale Version 9

Discounts, Gratuity, & Maintenance

Discounts may be applied either to the entire order or to individual items on the order. You may select a discount for a percentage off, amount off, include a service charge, automatic discounts based on items on check, apply discount cards, plus much more. Please read the following information to decide what discounts will work best for you and your business..

Breakdown of the Set Up section of Discounts, Gratuity, & Maintenance

Go to the Managers Menu → Discounts Gratuity Maintenance

- › **Name** – This field is used for entering a specific name for your discount. Keep in mind, this will show on the customer's receipt so it is best practice to create a clear and understandable name for your customer to recognize.
- › **Type** – This field tells the system what form of discount, gratuity, or charge to apply to the customer's receipt.
- › **Amount** – Depending on the Type, the amount could be a percentage or dollar value.

The screenshot shows the 'Set Up' form for discounts. It includes fields for Name, Type, Amount, Access Level, Category (set to 'Discount'), and Discount Id. On the right, there is a 'Sales Tax Adjust' section with dropdowns for Sales Tax (set to 1), Special Tax (set to 0), and Tax 3 (set to 0). Below this is a checkbox for 'Deducts Sales Tax or Charges Sales Tax' and two buttons: 'Manager Discount' and 'Open Reason Discount'.

- › **Access Level** – This field defines which employee(s) will have access to apply a specific discount, gratuity, or charge.
MicroSale has 10 different access levels 0-9. "0" Access is a Cook, only allowing Clock in or Clock out, "9" being the highest for Supervisor, allowing all back of house functions. For larger discounts, you may want to choose Manager or Assistant Manager, for lower discounts or promos; you may want to choose Cashier or Server.
- › **Category** – This field determines where the discount, gratuity, or charge will show on reports. Always choose a category that best describes what type of discount, gratuity or charge you are using.
- › **Discount Id** – This field is used in conjunction with Coupons. This is explained later in the document.
- › **Sales Tax Adjust** – Since menu items have 3 different areas for taxes, your discounts, gratuity, and service charges also have these available.
 - Sales Tax set at 1 will adjust the tax based on the price of the item/check AFTER the discount. (100% off item will charge 0 tax)
 - Sales Tax set at 0 will charge based on the pre-discounted price. (100% off item will still charge the tax based on original price)
- › **Manager Discount & Open Reason Discount** – These are both quick keys used to create default discounts. The Manager Discount will record the Manager's Name as the Discount Name. Whereas the Open Reason Discount will prompt the user to enter a Discount Name and Amount while on the ordering screen.

Breakdown of the Types of *Discounts, Gratuity, & Maintenance*

- › **Amount Prompt:** Works similar to Open Reason Discount. When in the Discount on the Order Screen, you will select a reason and a price for the discount.
- › **Charge Amount:** (Goes with Category of Service Charge) This type will tack on a dollar amount charge to a check
- › **Charge Percentage:** (Goes with Category of Service Charge) This will add a percentage to the check.

For example, you add 5% onto the check for using the Party Room.

- › **Check Percentage:** This will take off a percentage off of the total check.
 - › **Combo Amount:** Takes off a dollar amount on a list of Combo Items.
 - › **Combo Percentage:** Takes off a percentage of the Combo List. The Discount will be taken off of the item in the 'Combo Item' or the Constant.
- For Example, putting a 100 in the amount for combo percentage, the Combo Item or Constant will take 100% off.

The screenshot shows a software interface for configuring discounts. On the left, there is a 'Menu Items' list with items like '1 MB 1 Sausage', '10oz NY Strip', '10oz Ribeye', etc. On the right, there is a 'Combo Item' configuration area. It includes a 'Constant' field, a 'Variable' field, and a 'Variable' field under 'Combo Match #1'. There is also a 'Variable' field under 'Combo Match #4'.

- › **Combo Set Amount:** Will Recalculate total on the combo items and create a set price.
- › **Discount Percentage:** takes a percentage off of the menu item(s).
- › **Donation\$:** Adds on a price to the check as a donation.
- › **Donation%:** Adds on a percentage of the check as a donation.
- › **Gratuity:** Enables your servers to charge a gratuity on checks. This can be set as an automatic charge set in Register Options, or you can give the server the option to charge or not. A gratuity is set similar as a discount however the gratuity will only show up on the Gratuity Function button and will not be placed with the discounts. (Remember to set the category to Gratuity)
- › **Minimum Amount (or Percentage):** This will discount the guest check either by a percentage or a dollar amount based on the restrictions of the promotion, such as a minimum amount for the guest check.

For example, the guest check total must be at least \$50.00 for the customer to receive a 10% discount. You can also restrict the discount to items from a particular category, group or single item.

Text changes to:

Minimum Check Amount for Discount

0.00

- › **Open Amount:** Enables the manager/access level user to type in an open amount \$ for a discount. You will select a predetermined name however the dollar amount for the discount can vary.
 - › **Open Gratuity:** Enables the user to type in an open amount \$ for a gratuity. You will need to assign a Name, however, leave the Amount field blank. Remember to set the category to Gratuity
 - › **Open Percentage:** Enables the user to type in an open amount percentage for a discount. You will need to assign a Name, however, leave the Amount field blank.
 - › **Percentage Prompt:** Works the same as Open Percentage.
 - › **Set Price:** Enables you to create promotions or specials for a 'set price'.
- For example, using the "Items needed to match", or the Combo List, you can recalculate totals to match the price listed in the discount.

Breakdown of the Category

The category you select (by default it is set to "Discount"), will affect where the discount is recorded on audits and other reports. Always select a category that best describes what type of discount, gratuity, or service charge you are using.

- › **Combo** – Used in conjunction with the Combo List button and forces the discount to be automatic whether "Automatic Discount" is enabled or not. This does not indent the items to make part of a menu item called "Combo" instead it applies a set price or deduction amount to the items as a whole.
- › **Combo Item** – Used in conjunction with the Combo List button and forces the discount to be automatic whether "Automatic Discount" is enabled or not. This indents the items to make part of a menu item called "Combo", no discount shows on receipt.
- › **Coupon** – Used for specials or promotions where a customer "brings the discount".
- › **Department** – Used to discount by department only. Select which departments will qualify in the "Discounts / Coupons Match With" section.
- › **Discount** – Commonly used for most discounts based on percentages or dollar amounts.
- › **Frequent Diner** – When set, this discount will NOT appear in the discount selection screen unless a frequent diner customer account has been accessed on the order screen. This allows you to make a discount specifically for your frequent diner programs.
- › **Gratuity** – Set this category when using a Type of "Gratuity" so that it will record properly in reports as well as appear when the "Gratuity" button from the Ordering Screen is accessed.
- › **Issue Coupon** – Triggers a coupon to print on the bottom of the customer's receipt.
- › **Member** – Works in conjunction with the House Accounts / Membership services feature.
- › **Non Sales Discount** – Allows you to discount or subtract charges on a "Non-sale" such as a House Account or Gift Card purchase.
- › **Service Charge** – Works in conjunction with the "chargeable" discounts and with the delivery charges as well.

Issue Coupon

There are two different ways we can configure a coupon to appear on customer receipts.

Option 1		Option 2	
Pros	Cons	Pros	Cons
Can be tracked and only used once	Cannot set a transaction frequency	Can set a transaction frequency	Cannot be tracked – all codes will be the same
Displays a unique code per each coupon	Shorter message length	Longer message length	Cannot limit how many times it is redeemed
Barcode	Will not auto print	Barcode	Will auto print

Setup Option 1

1. Enter a Name, Type, Amount, and Access Level of your choice
2. Select the Category of "Issue Coupon".
3. Save

Using Option 1

1. Select the "Discounts" function button on the ordering screen.
2. Select the Coupon.
Note: It will add as an item on the Virtual Check but will not print to any remote printers. It will print as a coupon on the receipt.
3. When the check is closed it will print the coupon at the bottom of the customer's receipt.



Setup Option 2

1. Enter a Name, Type, Amount, and Access Level of your choice
2. Select the Category of "Issue Coupon".
3. Enter a number into the "Discount Id" field.
4. Select Save.

Example:

A screenshot of the 'Set Up' form for creating a coupon. The fields are: Name (\$2 Off Purchase), Type (Discount Amount), Amount (2.00), Access Level (Cashier), Category (Issue Coupon), and Discount Id (55). To the right, there are checkboxes for 'Sales Tax Adjust', 'Sales Tax' (checked), 'Special Tax' (unchecked), and 'Tax 3' (unchecked). Below these are checkboxes for 'Deducts Sales Tax' and 'Charges Sales Tax'. At the bottom right, there are buttons for 'Manager Discount' and 'Open Reason Discount'.

Setup Option 2 (Continued)

1. Select the "Have One on Me Menu" button.
2. Enter a Name.
3. Select an Access Level.
4. Enter a Coupon Description – this prints on the customer's receipt to describe the coupon.
5. Enter the "Discount Id" entered earlier into the "Link Code Number" box. This will enable a barcode to print with the coupon.

A screenshot of the 'Have One on Me' form. It has fields for Name (\$2 Off Coupon) and Access Level (Cashier). Below these is a table with columns 'Font', 'Justified', and 'Description'. The table contains two rows: 'Bold Center Get \$2 off your next purchase when you spend \$10!' and 'Normal Left Coupon Code: 55'. At the bottom, there is a 'Link Code Number' field with the value 55, and three buttons: 'Remove', 'Save', and 'Exit'.

6. Go to the Managers Menu → Messages Menu → Random Messages / Coupons

7. Enter a Name into the “Transaction Event” field

8. Select “All Registers” or a specific register to allow coupons to print from.

9. Enter a value into the “Transaction Frequency” field.

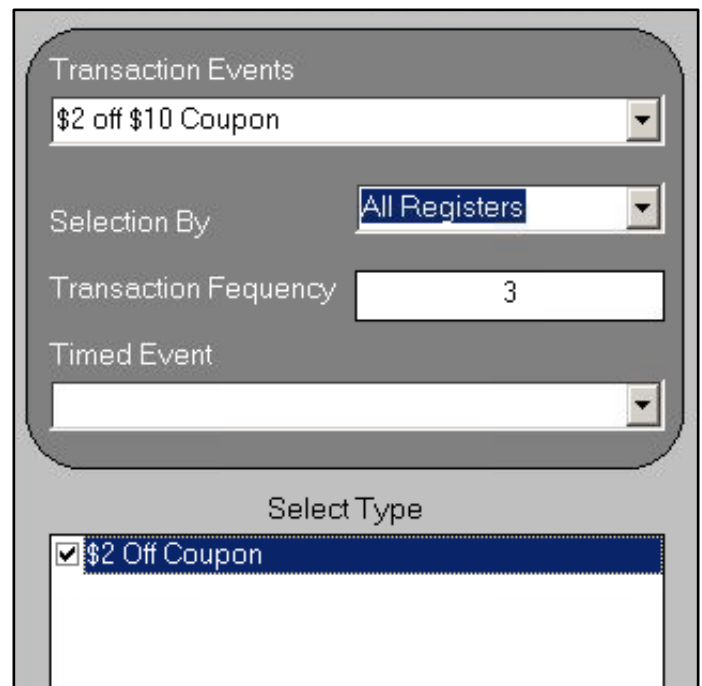
This will tell the coupon how often it should print.

10. Optional: Select a timed event from the dropdown menu. If you do not have one, you will want to create one from the Menu Maintenance area. This can be used for Happy Hour coupons, etc.

11. Select the checkbox next to the coupon previously created.

12. Select “Save”.

13. Select “Exit” when finished.



Breakdown of the Combo List

This screen allows you to match up items to take an automatic discount. This includes up to 7 items (one counting as your main Combo Item).

Example #1: You have a Pitcher of Beer and 25 Wings for \$15.00 (Combo Set Amount). Your Combo Item, or constant, is 25 Wings. The Combo Match #1 variable will list all types of Pitchers (Bud Light, Miller Lite, Coors Light, etc.)

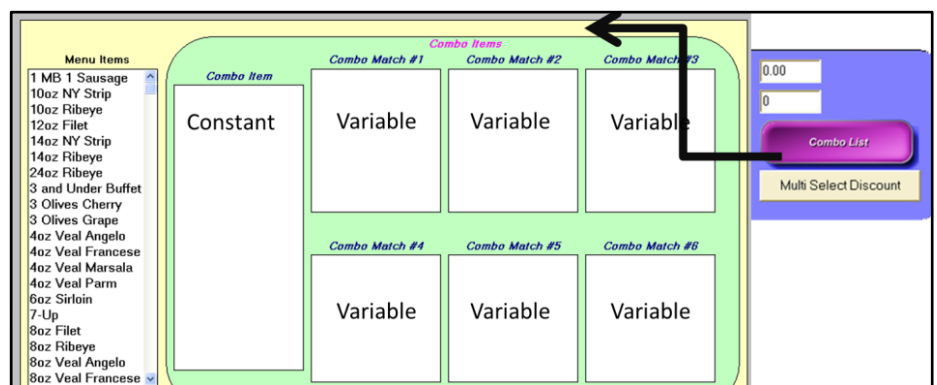
Example #2: You have a variety of menu items that make up a combo meal for 20% off (Combo Percentage)

You get a Sandwich, Soda, and a Side for this combo.

Your Combo Item, constant, is the sandwich. The combo item will display ALL sandwiches that you can choose for this combo.

- › Combo Match #1: ALL Sodas included. Coke, Diet Coke, Sprite, etc.
- › Combo Match #2: ALL Sides included. Fries, Onion Rings, Cole Slaw, etc.

MicroSale will pick out one item in each of these lists and create it into a combo. If you allow multiple discounts per seat, this could make up a variety of discounts.



Breakdown of Combo Item

When items are picked individually, MicroSale can detect that the items actually make up a combo meal. This helps the customer save money and prevents the cashier from reentering the individual items as a combo meal.

Combo Detection has two options:

1. Automatically recreate the items into a combo menu item with the appropriate price.
Beneficial for quick service restaurants to create items into a "Cheeseburger Combo", "Chicken Nugget Combo", etc.
2. Automatically discount the items when applicable items are on a check.
Beneficial for automatic BOGOs, combination specials (ex: 18 wings, pitcher of beer, and side of fries for \$X.XX), etc.

Combo Menu Items

1. Create the Combo Name. (Use "Meal", "CMB", "Combo" etc.)
This Combo Name will be suffixed at the end of the menu item that it is inserted into the Combo Item box.
Note: Keep in mind that receipts only allow 18 characters. If the menu item name is too long, your combo name may cut off.
2. Select a Type **ONLY** use Combo Amount or Combo Set Amount.

Combo Amount: Takes off the actual amount that is typed in the Amount Box.

Ex: 1 = \$1 off, .38= 38 cents off

Combo Set Amount: Uses the price set in the Amount Box as the total price for the combo.

Ex: 5 = \$5.00 total combo price, 10= \$10.00 total combo price

3. Select a low Access Level such as Cashier or Server
4. Select Combo Item as the category.
5. Ignore the Discount ID and all other options.
6. Select the Combo List button

Example:

1	BURGER Combo	5.99
	MEDIUM	
	ICED TEA	
	SIDE COLE SLAW	

Set Up	
Name	Combo
Type	Combo Set Amount
Amount	5.99
Access Level	Cashier
Category	Combo Item
Discount Id	0
Sales Tax Adjust	
Sales Tax	1
Special Tax	0
Tax 3	0
Deducts Sales Tax or Charges Sales Tax	
Manager Discount	
Open Reason Discount	

Now it's time to select our items that will be included within the Combo Menu Item.
You *cannot* put the same menu item name in more than one box.

Menu Items	Combo Items		
BURGER BURGER SPECIAL BUSHMILLS BUTTER SHOTS BUTTERY NIPPLE CAESER SALAD CAKE CALAMARI	Combo Item	Combo Match #1	Combo Match #2
	BURGER	SIDE BAKED POTAT	ICED TEA
	FISH TACOS	SIDE COLE SLAW	LEMONADE
	LETTUCE WRAPS	SIDE FRIES	MOUNTAIN DEW
	PULLED SANDWICH	SIDE FRUIT	PEPSI

7. Choose a *primary* menu item from the Menu Items box and insert it in the Combo Item box.
Example: Hamburger or Chicken Sandwich
8. Choose an additional item for the combo such as a side and place it in the Combo Match #1 box
Put all types of sides you can get within this box.
9. Choose an additional item for the combo such as a drink in the Combo Match #2 box

Put all types of drinks within this box.

- Note: The combo feature must have exact matches. If you have shift pricing in your menu, you must put all shift prefixes in the combo boxes.
- Select the Menu Item in the Menu Items box and choose a shift prefix
- Select the appropriate Combo Match box

10. When finished selecting all items needed, select Done.

11. Select Save from the Discounts Setup screen.

Menu Items	Combo Item	Combo Match #1	Combo Match #2	Combo Match #3	Combo Match #4	Combo Match #5	Combo Match #6
New Rep Dammit	Cheeseburger	SM Fries	SM Pepsi				
Newcastle BTL	Grilled Chicken	SM Cole Slaw					
Nuts and Berries	DBL Bacon	SM Fruit					
Nutty Irishman	Spicy Chicken	SM Onion Rings					
NY Strip Steak	Chic Nug	MD Fries					
Old Fashioned		MD Fruit					
Onion Rings		MD Onion Rings					
Outer Banks Sunrise		MD Cole Slaw					
Pacificio BTL		LG Cole Slaw					
Pancakes Full Stk							
Pancakes Short Stk							
Pasta Alfredo							
Patron Cafe							
Patron Silver							
Pepperoni Pizza							
Pepsi							
Philadelphia							
-Philadelphia							
Pina Colada							
Pinot Grigio							

SM Clear

Add PreFix

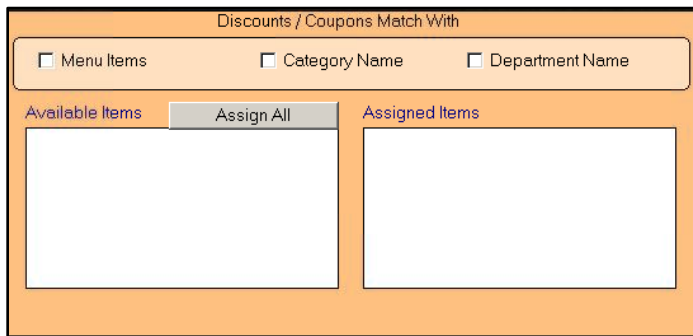
Breakdown of the Criteria Section

The screenshot shows a software interface for configuring discount criteria. It features a blue background with white text. On the left, there are five checkboxes: 'Applies to assigned only (discount type % only)', 'Allow only 1 Discount Per Seat', 'Automatic Discount Deduction', 'Modifiers are not included', and 'Coupon Number Tracking'. To the right of these checkboxes are two input fields: 'Maximum Amount Allowed Per Transaction' with the value '0.00' and 'Items Needed to Match Per Transaction' with the value '0'. Below the input fields are two buttons: a purple button labeled 'Combo List' and a grey button labeled 'Multi Select Discount'.

- › **Maximum Amount Allowed Per Transaction:** *Default is 0.00*
The “0.00” value disables this function, however, when a dollar amount is set, this dollar amount will be the maximum discounted amount.
For example, a large party comes in on one check and the person paying has a 25% off coupon, if the Maximum Amount Allowed is set to \$10, although the bill is \$200, the discount will only take off \$10.
- › **Items Needed to Match Per Transaction:** *Default is 0*
This function is available for many different discount types.
For example, the quantity would be set to 2 for a BOGO (Buy One Get One). The lower priced item will take the discount. In order for this function to be used, you must set the ‘Match With’ area.
- › **Multi Select Discount:** This button works in conjunction with the “Items Needed to Match Per Transaction” function. The Multi Select Discount sets the Items Needed to Match field to “100”, allowing you to select specific / or all items on the check.
- › **Allow only 1 Discount Per Seat:** When this criterion is selected, you will only be allowed to take one discount per seat (or per single check).
- › **Automatic Discount Deduction:** When selected, a menu item will take the related discount automatically. To be used correctly, you must use it with the “Type” of Discount Amount. You must also assign specific menu items to this option. (see Discounts / Coupon Match With)
 - This function serves a second purpose: Select the Automatic Discount Deduction for “Combos” (Refer to Combo List) when you would like the Combo List discount to be taken during a set time/day. For example, get a “get a pizza and pitcher for \$12.99 from 4pm-8pm Monday and Wednesday”
- › **Modifiers are not included:** When checked, the discount will not apply to charged modifiers. (When unchecked, the charged modifier will discount with the discounted menu item)
- › **Coupon Number Tracking:** Used for Groupon or other internet special promos. This number will track and delete off from the Groupon/ internet special promo.

Breakdown of Discounts / Coupons Match With

This section allows you to decide which items, categories, or departments you would like to discount.



Note: This is only used for percentage discounts. When choosing menu items, categories or departments, you can use the “Assign All” button to quickly move all items within the “Available Items” area to the “Assigned Items” area. You can then delete/remove an item from the Assigned Area by selecting it. Or you can select an item, one at a time, from the “Available Items” field and it will move it over to the “Assigned Items” field.

Breakdown of Availability

Similar to Timed Events, discounts can be permitted for specific days or times. When checked, the discount/coupon will NOT be available.

Coupon Not Available on Checked Days

By selecting a checkbox for a specific day(s) you can disable a discount, gratuity, or service charge from being applied.

For example, you can choose to not offer a discount or coupon on the weekend or create a special discount for a Monday to drive sales.

Time Available/ Expiration Date:

Select the field for either Start / End Time to bring up a time grid. If you select the “Expires On” field a calendar will display. The Expires On is a great feature for magazine, email, or newspaper coupons. Once the expiration date hits (after midnight on the expired day), the coupon will no longer work. This prevents staff from accepting expired coupons and also gives a reason to the customer as to why you will not accept “a day old coupon”.



Breakdown of Discount Events

The “Discount Events” area links specific or multiple functions together. This is most commonly used in conjunction with Delivery Service Charges – review the Delivery Charge document for an explanation of that specific setup.

Discount Card

Create a Discount → Select Save → Select the Discount Events button

- › Enter a number in the “Discount Search” field or swipe an encrypted card.
MicroSale or a 3rd party can make magnetic swipe cards with the same account number.
- › Place a checkmark within the field next to the discount you created earlier.
- › Select Save and then Done, when you are finished.
- › To receive the discount, select the Discount Card button from the order screen
- › Manually enter the account number or swipe the card you set up earlier to apply the predetermined discount.

For example, swipe a discount card with the account number 212332879 and receive a 10% In the Biz Discount.

Breakdown of Have One on Me

This function offers a more secure way to offer coupons for unsatisfied customers. Instead of a customer coming in and saying I talked to 'so and so' last time I was here and was told I would receive a free meal. Now you will surely know if a free meal was promised.

Scenario:

John places a To-Go order and picks up his food. He does not double check his order at the restaurant. When John gets home, he realizes that his Onion Rings were left out of the bag but he was still charged. He calls to inform you that he did not receive part of his order.

You pull up his information and attach a coupon to his name. You say "Give us your phone number or name the next time you come in and we will give you a free appetizer".

The screenshot displays a software interface for managing customer information and coupons. It features a table of customers, a form for customer information, and a modal for assigning a coupon.

Name	Phone	Address	City	State	Zip	Instructions
John Smith	681.1875	1221 W Brandon Blvd	Brandon	FL	33511	
Megan Dowdy		5	Brandon	FL	33511	
Megan Dowdy	3407745					Unhappy By Nancy Super
Phone Order						
Phone Order						
Phone Order						

Customer Information

Name: John Smith Phone: 681.1875

Address: 1221 W Brandon Blvd

City: Brandon State: FL Zip: 33511

Assign Coupon To Customer

Coupon To Be Used At A Later Time.

Yes No

Delete Card Number

Delete Customer Save Attach Coupon

Phone Search Address Search Name Search Print List Exit

Annotations:

- List of all Customers Saved from Phone Orders
- Pulled Information
- Attach Coupon

Now, enter a Name, Access Level of who can redeem the coupon, and enter a Description. You may leave the Link Code Number Blank.

To Apply Coupon: Manager's Menu→Reports Menu→Customer Information/Reports

Commonly Used Discounts

Military Discount

Takes 10% off Meal or Check (Depending on Criteria Set)

Name	Military Discount
Type	Discount Percentage
Amount	10
Access Level	Manager (or lower)
Category	Discount
Discount ID	0

Manager Meal

Takes 100% off Meal or Check (Depending on Criteria Set)

Name	Manager Meal
Type	Discount Percentage
Amount	100
Access Level	Manager (or lower)
Category	Discount
Discount ID	0

Two Pizzas for \$12.00 AKA Set Price

Recalculates Pizza Total

Must set items needed to match per transaction at 2 and select menu items or category names: Only pick the "Pizza Category" or Pizza Menu Items to ensure accuracy.

Name	2 for \$12
Type	Set Price
Amount	12.00
Access Level	Manager (or lower)
Category	Discount
Discount ID	0

BOGO Half Off

Takes 50% off lower priced item

Must set "Items needed to match per transaction" at 2 and select menu items, category names or department names at bottom of screen

Name	BOGO Half Off
Type	Discount Percentage
Amount	50
Access Level	Manager (or lower)
Category	Discount
Discount ID	0

BOGO Free

Takes 100% off lower priced item

Must set items needed to match per transaction at 2 and pick menu items, category names or department names at bottom of screen

Name	BOGO Free
Type	Discount Percentage
Amount	100
Access Level	Manager (or lower)
Category	Discount
Discount ID	0

\$2 Off Coupon

Name	\$2 Off Text Promo
Type	Discount Amount
Amount	2.00
Access Level	Manager (or lower)
Category	Coupon
Discount ID	0

Applying a Discount

1. Ring in all items for the order.
2. Select the Discount Button.
3. Choose the appropriate Discount. (Accessibility to this screen will be determined by job code.)
4. If you accidentally choose the wrong discount, simply select the discount on the virtual check and select the Void / Delete button.

