



How-To: Create Discounts— a condensed manual

How-To: Create Discounts

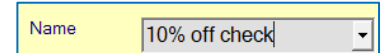
Managers Menu > **Discounts** Gratuity Maintenance

10% off a Check

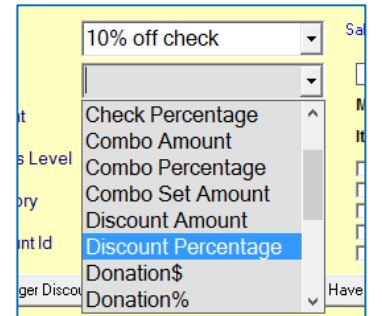
Please use this example to create any percentage amount off of a check. Replace the “10” with any desired number.

From the setup screen:

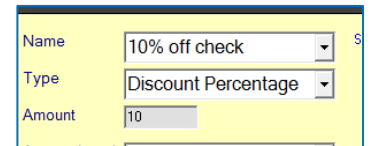
1. Type in a descriptive **name** for your discount – please be aware that this is the discount name that will appear on the customer’s receipt.



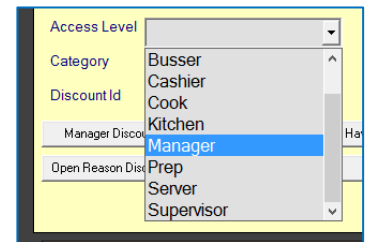
2. Select the dropdown next to **Type** and choose a discount type that best describes your discount name. To take off a percentage, choose the Type of *Discount Percentage*.



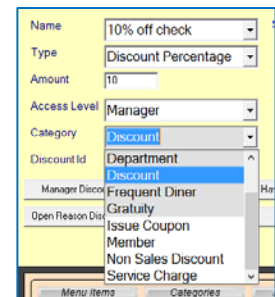
3. Next to **Amount**, type in the appropriate percentage amount – in this example, type in *10* to discount the check total 10 percent.



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**.



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:

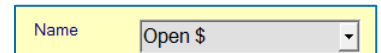
To only apply the discount to a select number of menu items on a check, select the option Multi Select Discount (it will auto insert 100 in the Items Needed to Match Per Transaction area).

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.

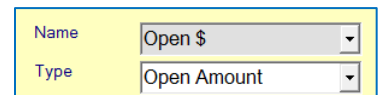
From the setup screen:

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.



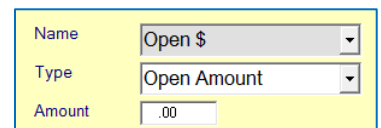
A screenshot of a software interface showing a form with a 'Name' field. The field contains the text 'Open \$' and has a dropdown arrow on the right side.

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*.



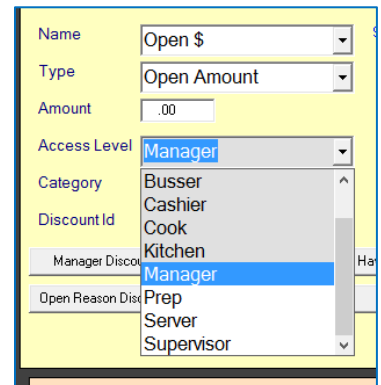
A screenshot of a software interface showing a form with two fields: 'Name' (containing 'Open \$') and 'Type' (containing 'Open Amount'). Both fields have dropdown arrows on the right.

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



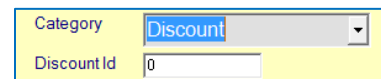
A screenshot of a software interface showing a form with three fields: 'Name' (containing 'Open \$'), 'Type' (containing 'Open Amount'), and 'Amount' (containing '.00').

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.



A screenshot of a software interface showing a form with several fields. The 'Access Level' dropdown is open, showing a list of roles: Manager, Busser, Cashier, Cook, Kitchen, Manager (highlighted), Open Reason Dis, Prep, Server, and 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**.



A screenshot of a software interface showing a form with two fields: 'Category' (containing 'Discount') and 'Discount Id' (containing '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.

The screenshot displays a software configuration window for a discount. The window has a title bar with 'Exit', 'Save', and 'Delete' buttons. The main area is divided into two sections.

Top Section (Yellow background):

- Name:** Open \$
- Type:** Open Amount
- Amount:** [Empty field]
- Access Level:** Manager
- Category:** Discount
- Discount Id:** [Empty field]
- Tax Settings:** Sales Tax: 1, Special Tax: 0, Tax 3: 0
- Time Available / Expiration Date:** Start Time, End Time, Expires On, Coupon Not Available on Checked Days
- Maximum Amount Allowed Per:** 0.00
- Items Needed to Match Per Transaction:** 0
- Checkboxes:**
 - Applies to assigned only (discount type % only)
 - Allow only 1 Discount Per Seat
 - Automatic Discount Deduction
 - Modifiers are not included
 - Coupon Number Tracking
- Buttons:** Manager Discount, Multi Select Discount, Have One On Me Menu, Open Reason Discount, Combo's, Discount Events
- Discount Department:** [Empty dropdown]
- Discount By Event Only
- Days:** Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday (all unchecked)

Bottom Section (Orange background):

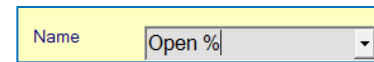
- Menu Items:** [Selected tab]
- Categories:** [Empty tab]
- Departments:** [Empty tab]
- Available Items:** [Empty list box]
- Assign All:** [Button]
- Assigned Items:** [Empty list box]

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.

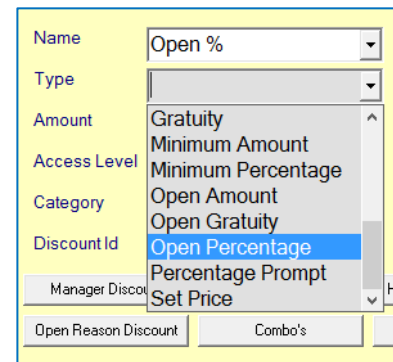
From the setup screen:

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.



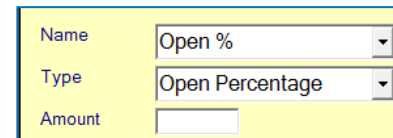
A screenshot of the 'Name' field in the discount setup screen. The field is a dropdown menu with 'Open %' selected and displayed.

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*.



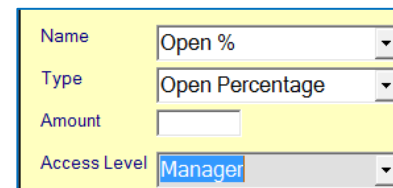
A screenshot of the 'Type' dropdown menu in the discount setup screen. The menu is open, showing options: Gratuity, Minimum Amount, Minimum Percentage, Open Amount, Open Gratuity, Open Percentage (highlighted in blue), Percentage Prompt, and Set Price. Other fields like Name (Open %) and Amount are visible in the background.

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



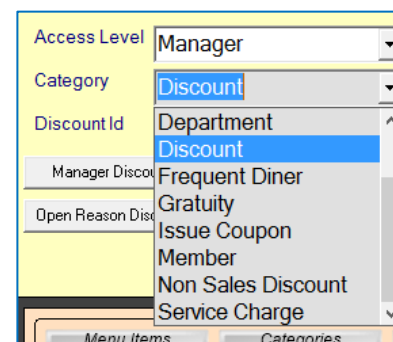
A screenshot of the 'Amount' field in the discount setup screen. The field is empty. Other fields like Name (Open %) and Type (Open Percentage) are visible in the background.

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.



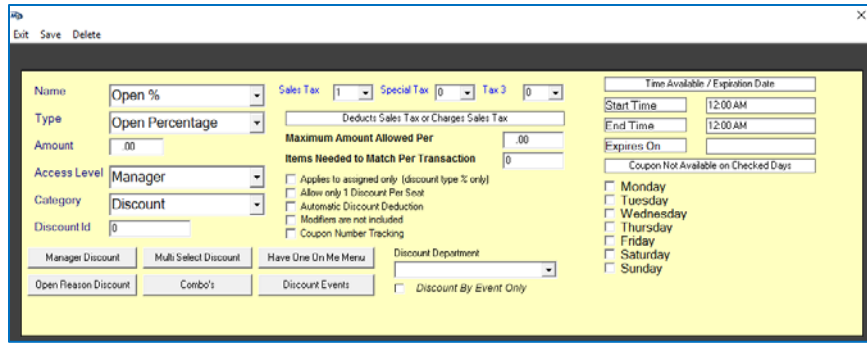
A screenshot of the 'Access Level' dropdown menu in the discount setup screen. The menu is open, showing 'Manager' selected and highlighted in blue. Other fields like Name (Open %), Type (Open Percentage), and Amount are visible in the background.

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**.



A screenshot of the 'Category' dropdown menu in the discount setup screen. The menu is open, showing options: Department, Discount (highlighted in blue), Frequent Diner, Gratuity, Issue Coupon, Member, Non Sales Discount, and Service Charge. Other fields like Name (Open %), Type (Open Percentage), Amount, and Access Level (Manager) are visible in the background.

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

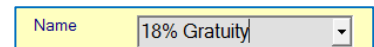


Gratuity on a check

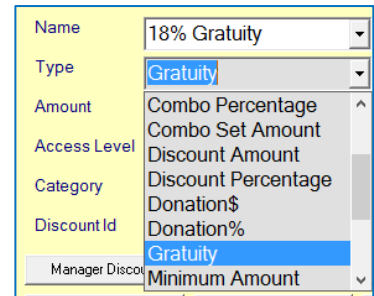
Gratuity, also known as a service charge, is programmed in the discounts setup area. A gratuity amount can be computed as a percentage of either the pre-tax or post-tax check amount.

From the setup screen:

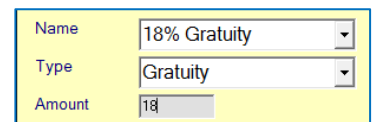
1. Type in a descriptive **name** for your gratuity– this name will appear on the guest check.



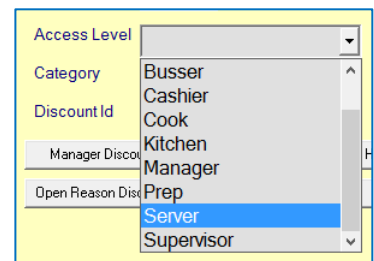
2. Select the dropdown next to **Type** and choose a discount type that best describes your discount name. To take off an open amount, choose the Type of *Open Percentage*.



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.



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.



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"/>	

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.

Name	18% Gratuity	Sales Tax	1	Special Tax	0	Tax 3	0	Time Available / Expiration Date		
Type	Gratuity	Deducts Sales Tax or Charges Sales Tax						Start Time		
Amount	18	Maximum Amount Allowed Per						0.00	End Time	
Access Level	Server	Items Needed to Match Per Transaction						0	Expires On	
Category	Gratuity	<input type="checkbox"/> Applies to assigned only (discount type % only) <input type="checkbox"/> Allow only 1 Discount Per Seat <input type="checkbox"/> Automatic Discount Deduction <input type="checkbox"/> Modifiers are not included <input type="checkbox"/> Coupon Number Tracking						<input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday <input type="checkbox"/> Sunday		
Discount Id		<input type="button" value="Manager Discount"/> <input type="button" value="Multi Select Discount"/> <input type="button" value="Have One On Me Menu"/>						Coupon Not Available on Checked Days		
<input type="button" value="Open Reason Discount"/> <input type="button" value="Combo's"/> <input type="button" value="Discount Events"/>		Discount Department						<input type="checkbox"/> Discount By Event Only		

<input type="button" value="Menu Items"/> <input type="button" value="Categories"/> <input type="button" value="Departments"/>		
Available Items	Assign All	Assigned Items
Empty table content		

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:

The screenshot shows a software window titled "Exit Save Delete" with a close button. The main configuration area is yellow and contains the following fields and options:

- Name: 15% Off a Coffee
- Type: Discount Percentage
- Amount: 15
- Access Level: Manager
- Category: Discount
- Discount Id: 0
- Sales Tax: 1, Special Tax: 0, Tax 3: 0
- Time Available / Expiration Date: Start Time 12:00 AM, End Time 12:00 AM, Expires On (empty)
- Options: Deducts Sales Tax or Charges Sales Tax, Coupon Number Tracking, Applies to assigned only (discount type % only), Allow only 1 Discount Per Seat, Automatic Discount Deduction, Modifiers are not included
- Buttons: Manager Discount, Multi Select Discount, Have One On Me Menu, Open Reason Discount, Combo's, Discount Events
- Discount Department: (empty)
- Days: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday
- Discount By Event Only

At the bottom, there are three tabs: "Menu Items" (highlighted in green), "Categories", and "Departments". Below the tabs is a list of items:

Available Items	Assign All	Assigned Items
COUNTRY STYLE BRKFST		COFFEE
CRAB BENEDICT		DECAF COFFEE
CRAB HOUSE OME		
CRANBERRY MED		
CRANBERRY XL		
CREAM CHEESE SIDE		
CROISSANT SANDWICH		
DECAF COFFEE		
DECAF TEA		
DIETER DELIGHT		
EGGS BENEDICT		

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.



Coupon Not Available on Checked Days

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday