



**Assyst Promotions
User Guide
Version 4.09**

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Introduction to Assyst Point of Sale Promotions

AssystPOS includes the Promotions module for the entry, tracking and maintenance of special pricing policies which may be in effect for a specific date range only.

It is common in many retail stores to have temporary sale pricing which applies for a specific time frame only. The Assyst Promotions module may be set to override the standard pricing on specific items for a limited time or to facilitate liquidation of products at prices below their acquisition cost.

Tills access the promotion files and are able to identify items set to be on promotion for the day. Special pricing is turned off by the system automatically at the end of the last day in which the promotion is set to be valid.

As well, the Assyst Point of Sale Promotions module may be used in conjunction with the Loyalty module to offer bonus point rewards on specific product purchases and allows for the offer of special sale pricing as a reward available only to customers with loyalty cards.



Promotion Maintenance



Within Assyst Point of Sale, promotions may be created by selecting **Promotions** in the **Maintenance** panel of the POS Functions ribbon group.

Creating a New Promotion

After opening Promotion Maintenance, click on the icon to create a new promotion.

In the Promo # field, enter a number not previously used in Promotion Maintenance to indicate that a new promotion is to be created.

NOTE: If the promotion number entered has been used previously, the system will display a message indicating the promotion already exists. Click on **OK** and return to the prompt to try another promotion number.

Promotional Set-Up					
Search: Promo #: -					
Promo #:	987	Starting:	Dec 13, 2011	Ending:	Dec 31, 2011
Description:	XMAS 2011 SPECIALS		Lanes:	- ZZ	☐ Allow Discount
Type:	0	XRef:			☐ Members Only
Add Item Delete Item Tables ▾ D/C Item Import Download Print Confirm					
Item	Qty	D/C	Price	Cost	GM%
Additional Item Information					
UPC:	<u>Costs</u>	On Hand:	<u>Promo Totals</u>		
DIN:	Retail:	On Order:	Units:	0	
Order #:	Average:	% Last 12:	Sales:	.00	
	Current:	% Avg:	Costs:	.00	
	RELATED:		Margin:	.00 .00 %	
Select Valid Cross-Reference File To Import					
Press F12 For X-Ref Lookup					

The top section of the Promotional Set-Up screen contains the “Header” information. After setting a new promotion number, the following additional fields must also be set on all promotions to complete the configuration of the header:

Description – Enter a name to be used for the promotion. This name will only appear in reports and lookups in Assyst Point of Sale Promotions. Ideally this name will be descriptive enough to identify the promotion's content at a glance.

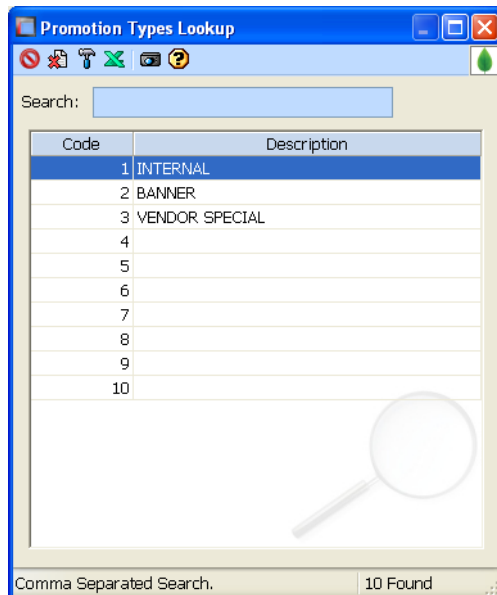


Starting – Enter the date on which the promotional pricing or rewards are meant to become available.

Ending – Enter the last date on which the promotion is meant to be in effect.

Type – This optional field may be used to define promotions by type codes. This field is not required and may be left blank if desired. Typically this option is used by locations participating in Multistore information transfers.

If the Type lookup is used, the following options are available to manage promotion types:



Edit – Click  to modify the description of the highlighted promotion type, or

Delete – Click  to clear the description of the highlighted promotion type.

The promotion type may be selected from the list by double-click OR by keying in the number referencing the desired promotion type. In the illustrated example, to set the type as a Banner promotion, the number 2 could be keyed into the Type field.

Lanes – The Lanes option actually contains two fields. The usage of this field is to set the range of till lanes on which this promotion is available. For example, if certain candies are on discount but only if purchased at the express tills, the Lanes must be set to show the till ID range at which the promotion is to be available. If the promotion is to be available at all till lanes, the range must be left at the default values of (blank) and ZZ.

Allow Disc – This option indicates whether discounts may be permitted based on the promotional pricing. The question this option poses is: are items on this promotion also potentially eligible for other discounts such as item discounts, transaction discounts, and/or senior discounts? Select this option if discounts are permitted, or leave unchecked to disallow further discounts on promotional prices as set.

Members Only – This option is only available to stores using the Assyst Loyalty package. If selected, the promotional pricing and/or point rewards are only available to customers with loyalty cards. If left unchecked, the promotional pricing is available to all customers.

Xref – This field is used in conjunction with electronic promotion downloads from some vendors and/or banners. Please see the supplemental guide for your banner or supplier's promotions for more information on importing an electronic promotion file from your vendor or banner.



Adding Items to Promotions

Once the promotion header configuration is complete, items may be added to the promotion.

Items may be added to promotions in a variety of ways:

- Individually by selecting UPCs, wholesaler numbers, or searching by item descriptions
- By product grouping using existing Price Tables
- By importing an electronic promotion file from a vendor or banner
- Using Item Quick Maintenance to select one or more items for inclusion
- Copying an existing promotion

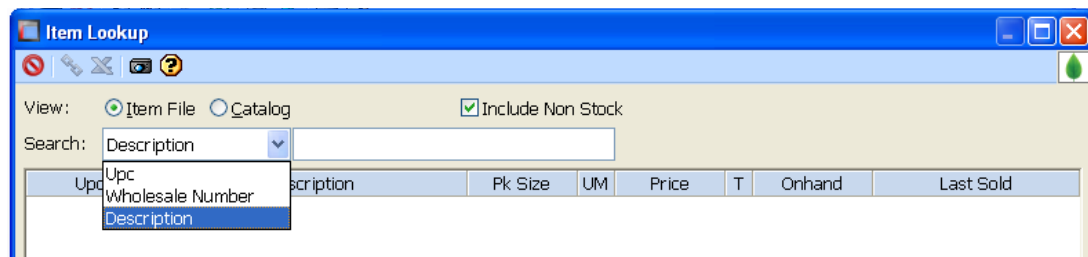
This section will cover the methods for adding items using each method excepting import of electronic promotion files. This information is available in the Supplemental guide(s) which contain details for specific vendor(s) or banner(s) which may be applicable to your store.

Supplemental promotions guides are available from the TELUS Health Solutions support desk for qualified users.

Adding Items by UPC, Wholesaler #, or Description

After completing the promotion header, click **+ Add Item** to add specific items by exact UPC, Wholesaler number, or to search by item description.

The default search is by item description, but may be modified after clicking the Add Item button and selecting the search options from the drop down menu.



If more than one match is found when searching by wholesaler number or item description, it is necessary to select the desired item from the grid to add it to the promotion.

At this point the system will display options for adding the selected item to the promotion.

For each item as it is added to the promotion, set the options as follows:

Price – This refers to the retail price to be in effect during the promotional period.

Cost – If the cost for this product during the promotional period has a cost other than the average acquisition cost, enter the promotional cost appropriate to acquisition of the item.

GM% - The system automatically displays the gross margin based on the promotional cost and price of each item.

Limit – The Limit option is not used at this time. Press Enter to bypass the Limit field.

■ **NOTE:** To switch between showing the Limit or Points column for Members Only promotions, right click on any product in the promotion and select **Show Points** or **Show Limit**.



Points – When working with a Members Only promotion, the system may display the Points column as opposed to the Limit column. Enter the number of points to be rewarded for the item, or a negative number of points to be redeemed to receive the promotional price listed.

For example, where 50 points are to be awarded to loyalty customers for purchasing the item, the points option will be set to a value of 50. Where 100 points are to be redeemed on an item to receive the promotional pricing, the points column will need to show a value of -100.

Promotional Set-Up

Search: Promo #: -

Promo #: 987 Starting: Dec 13, 2011 Ending: Dec 31, 2011 ☐ Allow Discount

Description: XMAS 2011 SPECIALS Lanes: - ZZ ☐ Members Only

Type: 0 XRef:

+ Add Item - Delete Item Tables D/C Item Import Download Print Confirm

Item	Qty	D/C	Price	Cost	GM%	Points
COFFEE CRISP	0001	☐	\$1.09	\$.810	25.68	
TOTAL ITEMS/GM AVERAGE	1				.00	

Additional Item Information

UPC: 5980000021	Costs	On Hand: 50	Promo Totals
DIN:	Retail: 0.99 T BARS	On Order: 0	Units: 0
Order #: MCK-323758	Average: 0.8287 16.3 %	Last 12: 98	Sales: .00
	Current: 0.828 18.2 %	Avg: 8.2	Costs: .00
RELATED:			Margin: .00 .00 %

F6 - Price Table F8 - D/C Item Press F7 To View/Modify Item Details

Continue adding more items as needed.

Adding Items by Price Table

To add items by price table, click on the Tables button. The system will display options relating to management of price tables within a promotion.

Add New From Price Table F6
 Add/Edit Promo Table
 Delete Table From Promo

To add all products from an existing regular price table, click the **Add New From Price Table** icon.

Price Table Lookup

Search: BAR

Price Table	Qty1	Price1	Qty2	Price2
BARBASOL	1	3.59		
BARS	1	1.19	2	1.69

Additional Information

Description: REGULAR SIZE CHOCOLATE BARS
Items: 46

Comma Separated Search. 2 Found

The system then displays a list of price tables currently entered in the system. The price table list will show all price tables applicable to regular pricing calculations. Use the search bar to look for the desired table.

If it is necessary to determine which items are listed on a price table, highlight the price table desired and click the icon. This option shows the list of items tied to the table.

Double click the desired price table to add all items from the price table to the promotion.



NOTE: If some items on the table added are to be exempted from eligibility for promotional pricing, they may be deleted later.

The system then prompts for the configuration of a new price table that applies only to the promotion.

Qty	Target	Price	Margin	Tax 123
1	27	1.19	27.7%	☒ ☒ ☐
2	27	1.69	-1.8%	☐ ☐ ☐

If a special promo cost applies to all of the items on the price table, enter it in the Promo Cost field.

Then set any price break levels and the pricing applicable to them.

For example, the illustration shows that the purchase of 1 item on this promotional price table is available for a price of \$1.09. For two units tied to the promotional price table, the total price will be \$1.69 before applicable taxes.

The system also calculates and displays the margin for each price break level.

As with regular price tables, the first price break level must always be set as the pricing for a quantity of 1 unit of the product(s). Additional price break levels may be added as needed.

The **Mix and Match For Price Breaks** option may be selected to allow mixing and matching of items on the promotional price table to receive price breaks. Thus a customer may purchase two different items tied to the promotional price table and receive the price break for 2 items. If this option is not selected, the price break will only be permitted where two identical products are purchased.

Click  when finished modifying the promotional price table to save it and return to the promotional setup screen.

Any items tied to a price table will now display with a “T” in place of the quantity portion of the two part price field.

Adding Items Using Item Quick Maintenance

Assyst Point of Sale contains a function called Item Quick Maintenance. This function may be used to add one or more items to a promotion very quickly and with minimum fuss by identifying items configured using similar settings.

To access Item Quick Maintenance, click on **Quick** in the Maintenance section of the POS Functions ribbon group.

The system displays a search window which is intended to find multiple items with similar characteristics. The boxes encircled in purple in the illustration are search boxes which may be used to select items with the criteria specified.

For example, if items in Department 12 and Family 1216 are to be shown, The Dept and Family options must be set accordingly. Only items meeting ALL of the search criteria will be displayed.



Item Quick Maintenance

Primary Filters Secondary Filters

Dept.: 1	Start	End	9999
Family:		ZZZZ	
Pack Size: 0.00		9999.99	
Mfg:		ZZZZ	
Vendor:		ZZZZZZZZ	
Buyer/Rep:		ZZZZZZZZ	
Location:		ZZZZZZ	

Description:	Start	End	ZZZZZZZZZZZZ
Search: Description			
Price: 0.00		999999.99	
Table: Price		ZZZZZZZZZZZZZZZZ	
Brand:		ZZZZZZZZZZZZZZZZZZ	
Margin: 999-		999	
Target: 999-		999	
Onhand: 999999-		999999	

Last Sold: 00/00/0000	Start	End	99/99/9999
Counted: 00/00/0000		99/99/9999	
Price Change: 00/00/0000		99/99/9999	
Set-Up: 00/00/0000		99/99/9999	
Changed: 00/00/0000		99/99/9999	
Received: 00/00/0000		99/99/9999	
Regular Cost: 00/00/0000		99/99/9999	

Class: 0	Start	End	99
Calc #: 0		99	
Waiting: 0		99	
Frozen: 0		99	

Stock Flag: Both

Promo: Check 0

Tax 123: Both Both Both

Discount: Both

Item Type: All Types

Field #1: Pack Size

Field #2: Price

Title: QUICK LISTING

Print To: ☒ Screen ☐ Printer ☐ Mark Items For Deletion

Continue

Enter Start Department.

The box encircled in green is used to indicate what information is to be displayed onscreen. By default, the system will display the UPC and Description of all items, as well as two additional details of your choosing. Select the desired **Field** values to show in the report.

Select the output to **Screen** and click on the **Continue** button to show the list of items matching the search criteria.

Item Quick Maintenance

Upc	Item Description	Pack Size	UM	Price
5610002622	OLD SPICE A/P AEROSOL	200.00 ML		3.85 T
5610004702	OLD SPICE A/P/DEOD INVIS CYPRU	73.00 G		6.79
5610000516	OLD SPICE DEO. STK. H/E FR.S	65.00 GM		3.50 T
5610000514	OLD SPICE DEO.STK. H/E ORIG.	65.00 GM		3.50 T
5610000512	OLD SPICE DEO.STK. H/E SPORT	65.00 GM		3.50 T
1204401350	OLD SPICE EVER CLEAR STRIDE	73.00 G		6.35 T
1204401348	OLD SPICE EVER CLR PURE SPORT	73.00 G		6.55
1204401945	OLD SPICE FRESH COLLECTION	3.00 PC		14.15
5610004701	OLD SPICE FRESH INV. DENALI	73.00 G		6.55
5610004700	OLD SPICE FRESH INV. FIJI	73.00 G		6.55
5610002516	OLD SPICE PURE SPORT ANTIPSPAN	48.00 G		4.55 T
1204400680	OLD SPICE SWEAT DEFENSE	73.00 G		6.55

Generate Labels: Yes

Additional Information

Vendor: MCK - MCKESSON CANADA	Order No: 758771	Pk Size: 200.00 ML	Remarks:
Price: 3.85 T	Avg Cost: 2.5800	GM%: 33.00	Type: Regular
Related:	Qty:	Desc:	Onhand: 2
			On Order: 0
			Last Sold: Nov 17, 2011
			Last 12: 15
			Counted: 1.3
			Average: 1.3

Enter Item Description.

12 Found



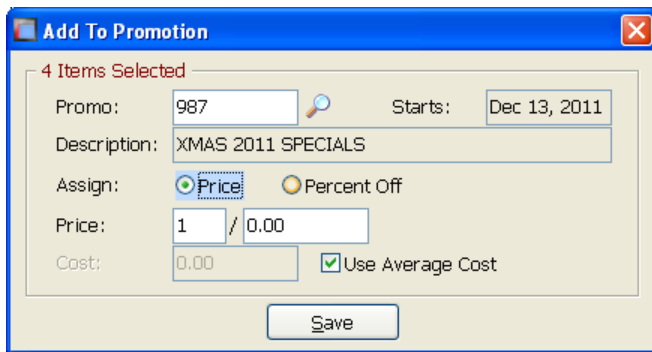
NOTE: If Price is set as one of the Field values, the system may show an additional prompt **Generate Labels For Price Changes**. The prompt requires confirmation of whether any items on which the regular price is changed should have new shelf tags added to the shelf tag queue. Check off this option to automatically enqueue applicable shelf tags for printing later or uncheck to skip, then click on **OK** to start the search.

To select multiple adjacent items in the list, highlight the first desired item and hold **Shift** on the keyboard to start a block. While still holding Shift, use the keyboard to scroll up or down to the end of the section of adjacent products to be added to the promotion.

Right click on the group of selected products and click on **Add to Promo**, or click on the  icon.

The following options may be used to set the selected items on promotion:

Promo – Key in the desired promotion number, or use the lookup to identify the promotion



Assign – Select **Price** to set a fixed promotional price for all selected products or **Percent Off** to determine promotional pricing through application of a standard percentage to regular retail prices

Price – If promotional pricing is to be assigned as a fixed price, key in the price

Percent Off – If promotional pricing is to be calculated using a standard percentage off regular retail prices, key in the percentage to be applied.

NOTE: The illustrated example includes items of multiple different price levels, which may need to result in different promotional pricing for each product. This may be advantageous where products with widely varying prices are selected.

Use Average Cost – This option, selected by default, will set the promotional cost for each selected item as its average cost. If this option is deselected, a fixed cost for all selected products will need to be entered in the **Cost** field.

Cost – Enter the promotional cost for all items selected.

NOTE: If the **Use Average Cost** option is selected, this option is unavailable.

Click on the **Save** icon to add the selected item or items to the promotion with the pricing as indicated in Item Quick Maintenance.

If pricing requires further adjustment, or items have been added in error, adjustments may be made in Promotion Maintenance for the promotion specified.

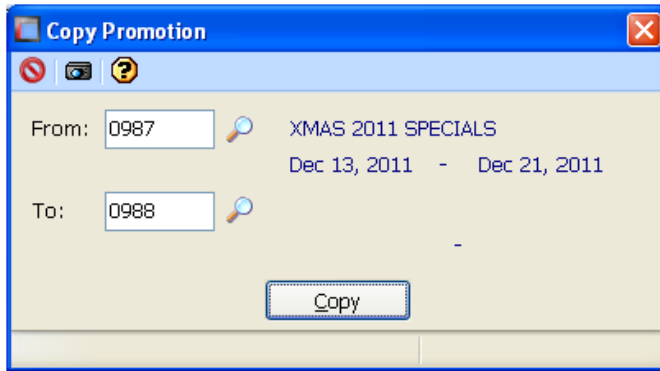
For more information about Item Quick Maintenance, please consult the Item Quick Maintenance User Guide.



Copying an Existing Promotion

Assyst Point of Sale allows for the creation of a new promotion based on the details of a previously created promotion.

Click on the  icon to copy a previously created promotion to a new promotion number.



Enter the original promotion number in the **From** field, and the new promotion number to the **To** field.

If the Copy To promotion number does not exist, an identical promotion to the original will be created including all item and header information.

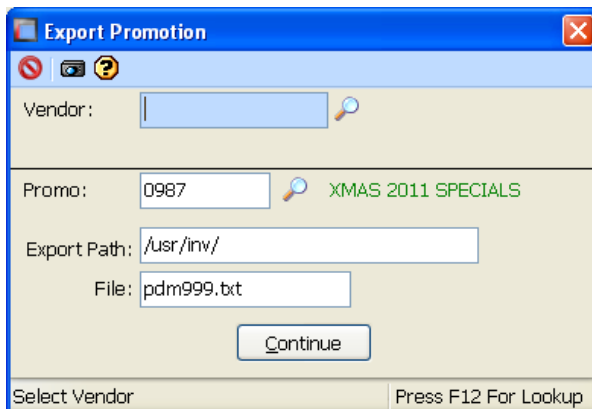
If the Copy To promotion already exists, the item list with the applicable promotional pricing, costing and/or point information will be transferred to the new promotion. Header information on the Copy To promotion is retained as well as any other items added manually to the destination promotion number.

Exporting a Promotion

Some banners and chains are able to export promotions for transmission to member stores to facilitate easier promotion setup.

To export a promotion to a transmission file, load the promotion in Promotion Maintenance.

When the list of items on the promotion appears onscreen, click on  to start the promotion export.



At this time, a valid vendor code must be used to export the promotion for transmission.

The vendor code to be used may vary by location and banner or buying group.

Upon entering the proper vendor code and pressing **Enter**, the system will prompt for confirmation of the promotion export.

The Promotion Export box shows the name of the promotion being exported and provides the name of the transmission file to be created.

The system automatically places all exported promotion files on the server. The directory in which the promotions will appear will depend on the vendor used, as will the file name.



Click **Continue** to create the electronic promotion file, or  to return to Promotion Maintenance without creating an electronic promotion file.

Once this file has been created, it is possible to transmit the file electronically to affiliated stores.

Review or Modify an Existing Promotion

After a promotion has been created, it may be necessary to modify the promotion. Common types of modifications include:

- Adjusting the promotion date range or other header information for a promo
- Adjusting the promotional price, cost, and/or points reward for an item
- Creating a Promotional Price Table for items not usually on price tables
- Removing an item added to a promotion in error
- Discontinuing promotions on specific items and/or
- Deletion of the promotion in its entirety

This section discusses the methods for performing all common types of modifications to a promotion.

 **NOTE:** If changes are made to a promotion, click on the  **Confirm** button to update the relevant item files.

Reviewing an Existing Promotion

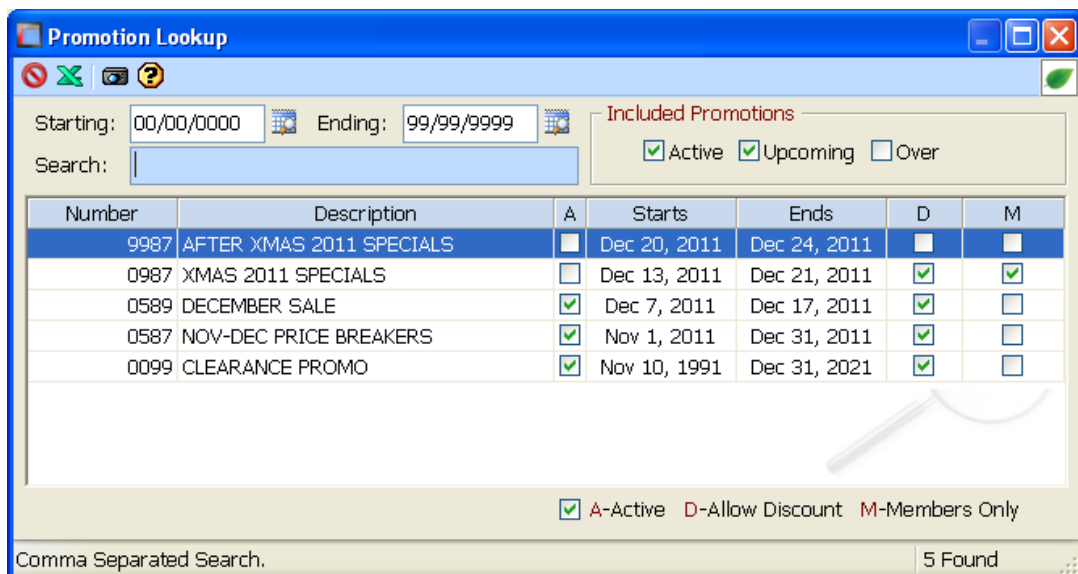
To load an existing promotion for review, it is possible to load the promo by one of the following methods:

- Enter the promotion number desired in the Promo# field or
- Click on the  icon to the right of the **Search** field to show a list

Promotions listed in the lookup will provide some basic information to aid in the easy identification of the promotion desired.

Where the promotion lookup is used, the system will automatically list any promotions that are currently active or set to become active in the future.

Within the lookup, the search panel may be used to change which promotions are displayed.



Promotion Lookup

Starting: 00/00/0000 Ending: 99/99/9999

Search:

Included Promotions: ☒ Active ☒ Upcoming ☐ Over

Number	Description	A	Starts	Ends	D	M
9987	AFTER XMAS 2011 SPECIALS	☐	Dec 20, 2011	Dec 24, 2011	☐	☐
0987	XMAS 2011 SPECIALS	☐	Dec 13, 2011	Dec 21, 2011	☒	☒
0589	DECEMBER SALE	☒	Dec 7, 2011	Dec 17, 2011	☒	☐
0587	NOV-DEC PRICE BREAKERS	☒	Nov 1, 2011	Dec 31, 2011	☒	☐
0099	CLEARANCE PROMO	☒	Nov 10, 1991	Dec 31, 2021	☒	☐

☒ A-Active ☐ D-Allow Discount ☐ M-Members Only

Comma Separated Search. 5 Found

Options exist to select promotions by whether they are **Active**, **Upcoming** or **Over**.



Promotions may also be selected by the **Start** and/or **End Date** ranges to show promotions active during the dates specified.

The **Search** bar may be used to search for promotions by description.

For all promotions matching the search criteria, the following details are displayed:

Number - Displays the promotion numbers.

Description – Displays the descriptions entered for each promotion.

Dates – The “Starts” and “Ends” columns show the start and end dates for each promotion. If a checkmark appears in the “A” column to the right of the start dates, the promotion indicated is currently active.

Discount – The discount column, appearing under the header “D” indicates whether discounts are allowed on the promotion.

Members Only – The members only column, appearing under the header “M”, indicates whether the promotion is limited to loyalty club members only. This column will only appear where Assyst Loyalty is enabled.

From the promotion list, the promotion to be reviewed may be loaded by double-clicking the desired promotion. Alternatively, the promotion lookup may be cleared by clicking  and the promotion number may be keyed into the **Search** field.

Promotional Set-Up

Search: **Promo #:** 0987 - XMAS 2011 SPECIALS

Promo #: 0987 **OVER** **Starting:** Dec 13, 2011 **Ending:** Dec 21, 2011 ☒ Allow Discount

Description: XMAS 2011 SPECIALS **Lanes:** - ZZ ☒ Members Only

Type: 0 **XRef:**

+ Add Item - Delete Item - Tables - D/C Item - Import - Download - Print - Confirm

Item	Qty	D/C	Price	Cost	GM%	Points
AERO BAR (1.00EA)	T	☐	\$1.09	\$.857	21.37	
AERO CARAMEL (41.0G)	T	☐	\$1.09	\$.610	44.03	
AERO DARK (42.0GM)	T	☐	\$1.09	\$.780	28.44	
AERO PEPPERMINT (45.0G)	T	☐	\$1.09	\$.819	24.86	
BIG TURK REGULAR SIZE (60.0GF)	T	☐	\$1.09	\$.818	24.95	
BOUNTY BAR (57.0G)	T	☐	\$1.09	\$.840	22.93	
BRIDGE MIXTURE (52.0G)	T	☐	\$1.09	\$.750	31.19	
CARAMILK (1.00EA)	T	☐	\$1.09	\$.780	28.44	
COFFEE CRISP (1.00EA)	T	☐	\$1.09	\$.828	24.03	
CRISPY CRUNCH (1.00EA)	T	☐	\$1.09	\$.756	30.64	
CRUNCH BAR (44.0G)	T	☐	\$1.09	\$.774	28.99	
CRUNCHIE (44.0G)	T	☐	\$1.09	\$.757	30.55	
DAIRY MILK (42.0G)	T	☐	\$1.09	\$.760	30.27	

Additional Item Information

UPC: 5980000011	<u>Costs</u>	On Hand: 60	<u>Promo Totals</u>
DIN:	Retail: 0.99 T BARS	On Order: 0	Units: 0
Order #: MCK-323733	Average: 0.8572 757.2- %	Last 12: 127	Sales: .00
	Current: 0.857 803.0- %	Avg: 10.6	Costs: .00
	RELATED:		Margin: .00 .00 %

F6 - Price Table F8 - D/C Item Press F7 To View/Modify Item Details



When a promotion is displayed onscreen, the promotional settings for each item may be adjusted by clicking on the desired option.

For each item on the promotion, an item snapshot is displayed at the bottom of the screen. Highlight any item to show the snapshot.

The item snapshot displays the promotional totals for each item including sales units, sales dollars or revenue generated, cost of the sales for the item relating to the promotion, and the margin earned on the sales for the highlighted product relating to the promotion.

Highlighting an item will also change the Additional Information section to display regular retail pricing and costing information, the last 12 months' sales for the product and the average monthly sales of the product over the last 12 months. As well, item onhands and on order quantities are displayed.

For more information about any listed item on the promotional setup screen, click on  to Zoom directly into the Item Maintenance screen for the selected item.

Adjusting Promo Dates & Header Information

The promo header may occasionally require modification after the setup of the promotion is complete. If the dates of the promo change, or an error is found, it is possible to modify the header details on the promotion.

Promotion header details may be modified at any time, but beware that in some cases where promotion dates are changed, it may be necessary to perform an 88 Action Code on the tills to make the changes take effect.

The only Promotion header field which can not be modified after the promotion is created is the promotion number.

Adjusting Promotional Pricing, Costing and Points Rewards

Promotional pricing and costing information is listed in each promotion for each item. Where special promotional costing is not set for a given product, the system uses the average cost as the promotional cost.

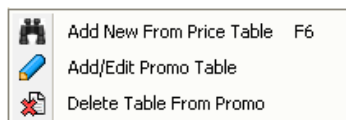
Move the arrow keys or use Page Up/Page Down to highlight the item requiring modification. If using a Windows computer, it may be possible to click on the desired item to highlight it.

Press Enter to move among the Price, Cost, Margin, and Points or Limit field to get to the option to be modified. When the proper field is highlighted, key in a new value.

After keying in the new value press **Enter** to lock in the new value before saving the promotion.

Creating a New Promotional Price Table

In some situations, promotions may be offered including quantity discounts by setting up a price table. As discussed earlier in the section entitled "Adding Items by Price Table", items added from a price table are automatically put onto a price table for the purposes of managing the promotion.



Select the first item to be added to the promotional price table.

Highlight the item and click on **Add/Edit Promo Table** within the Tables option to add the item to a promotional price table.

A list of promotional price tables will then appear. To create a new promo price table, click on  to create a new promotional price table.

Prepare the promotional price table by first giving it a Table ID. The table ID is meant to be an abbreviated code uniquely identifying the pricing policy indicated.



Set a description for the promotional price table if desired.

Select the **Mix Match For Price Breaks** option if different items linked to the same price table may be blended to get the price break. If not selected, the system limits the quantity price break to eligible purchases of identical items.

The price break level for the first eligible item will be set based on the promotional price indicated for the first product added. This may be modified here if desired.

Secondary price breaks may be set for quantities other than 1 unit purchased. In the example pictured to the left, purchasing 5 units of the product will result in a total price of \$4.00 for the 5 units.

Once the promotional price table has been created, it may be applied to other items by highlighting the other items individually and then clicking on Add/Edit Promo Table.

Removing an Item from a Promotional Price Table

If an item appears on a promotion but has been incorrectly tied to a price table, it is possible to remove the item from the promotional price table.

Highlight the selected item and click on Add/Edit Promo Table to access the price table information.

Click on the icon to remove only the selected item from the price table.

If the whole promotional price table is to be deleted, from within the price table, highlight the Description field and press **F5**.

NOTE: Deletion of an entire promotional price table has the potential to affect multiple products and therefore may not be the best method to use when adjusting promotional pricing. Removal of items individually from the price table may be the best way to manage this process.

Removing an Item from Promotion

Removal of an item from a promotion may refer to two things:

- Deletion of an item from promotion, or
- Discontinuing an item from promotion.

These two options have very different effects. This section discusses the deletion of an item from a promotion.

Typically, an item is only deleted from a promotion when it has been added to the promotion in error and was never meant to be part of the promotion.

Deletion of an item from the promotion results in:

- Immediate termination of available sale pricing and/or promotional loyalty rewards for the product and
- Deletion of all promotional sales history for the deleted item



To delete an item from an existing promotion, first load the promotion.

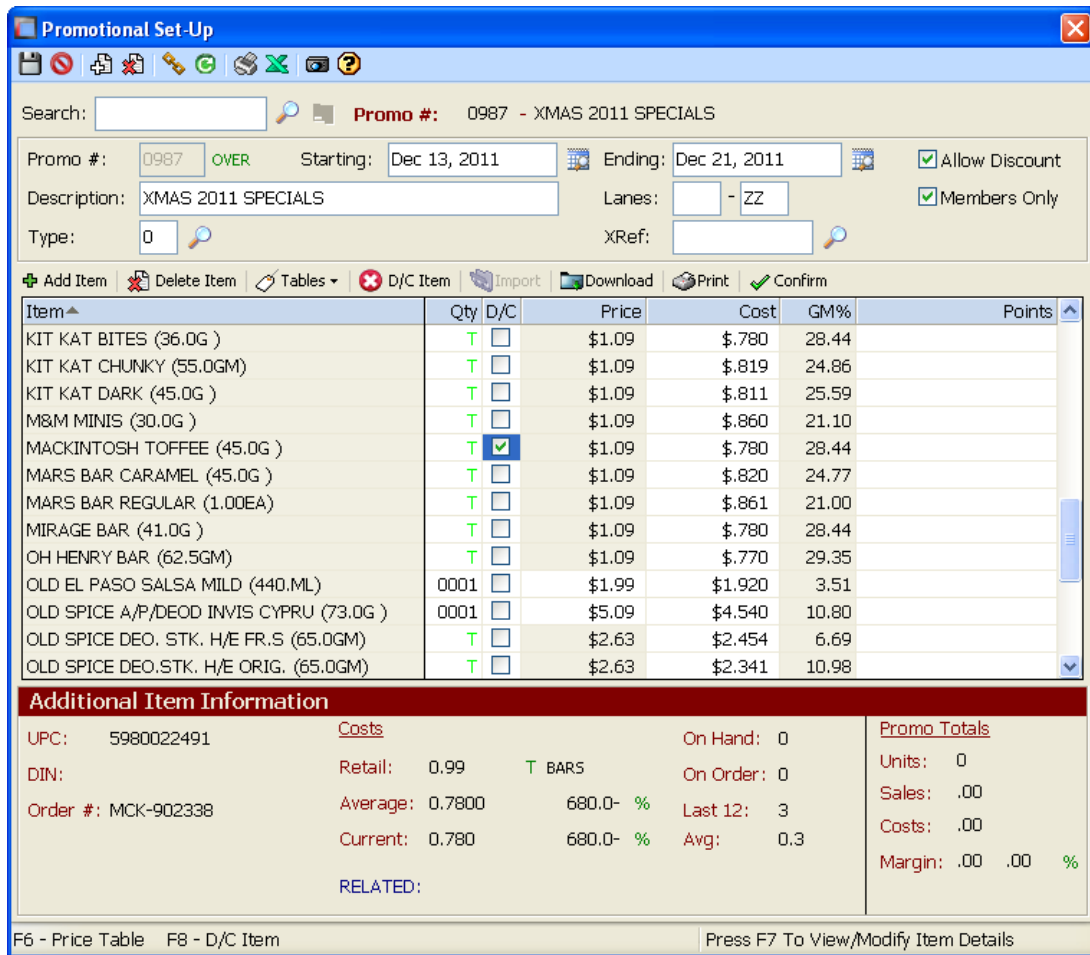
Highlight the item to be deleted from the promotion and click  Delete Item to delete the line item.

NOTE: Take considerable care using the Delete Item function as there is **NO CONFIRMATION** before the item is removed from the promotion. Once an item is removed from the promotion, its promotional sales history is discarded and may not be recovered.

Discontinuing an Item On Promotion

Discontinuing an item on promotion may be used as an alternative to outright deletion of the product from a promotion.

Using the Discontinue or D/C function retires the promotional price of the item on the promotion indicated, resulting in subsequent sales of the item at the regular retail price. Unlike item deletion from the promotion, the system will retain all sales information for the item that result from the promotion.



Promotional Set-Up

Search: **Promo #:** 0987 - XMAS 2011 SPECIALS

Promo #: 0987 **OVER** **Starting:** Dec 13, 2011 **Ending:** Dec 21, 2011 ☒ Allow Discount

Description: XMAS 2011 SPECIALS **Lanes:** - ZZ ☒ Members Only

Type: 0 **XRef:**

Buttons: Add Item, Delete Item, Tables, D/C Item, Import, Download, Print, Confirm

Item	Qty	D/C	Price	Cost	GM%	Points
KIT KAT BITES (36.0G)	T	☐	\$1.09	\$.780	28.44	
KIT KAT CHUNKY (55.0GM)	T	☐	\$1.09	\$.819	24.86	
KIT KAT DARK (45.0G)	T	☐	\$1.09	\$.811	25.59	
M&M MINIS (30.0G)	T	☐	\$1.09	\$.860	21.10	
MACKINTOSH TOFFEE (45.0G)	T	☒	\$1.09	\$.780	28.44	
MARS BAR CARAMEL (45.0G)	T	☐	\$1.09	\$.820	24.77	
MARS BAR REGULAR (1.00EA)	T	☐	\$1.09	\$.861	21.00	
MIRAGE BAR (41.0G)	T	☐	\$1.09	\$.780	28.44	
OH HENRY BAR (62.5GM)	T	☐	\$1.09	\$.770	29.35	
OLD EL PASO SALSA MILD (440.ML)	0001	☐	\$1.99	\$1.920	3.51	
OLD SPICE A/P/DEOD INVIS CYPRU (73.0G)	0001	☐	\$5.09	\$4.540	10.80	
OLD SPICE DEO. STK. H/E FR.S (65.0GM)	T	☐	\$2.63	\$2.454	6.69	
OLD SPICE DEO.STK. H/E ORIG. (65.0GM)	T	☐	\$2.63	\$2.341	10.98	

Additional Item Information

UPC: 5980022491	Costs	On Hand: 0	Promo Totals
DIN:	Retail: 0.99 T BARS	On Order: 0	Units: 0
Order #: MCK-902338	Average: 0.7800 680.0- %	Last 12: 3	Sales: .00
	Current: 0.780 680.0- %	Avg: 0.3	Costs: .00
RELATED:			Margin: .00 .00 %

F6 - Price Table F8 - D/C Item Press F7 To View/Modify Item Details

To Discontinue an item from the promotion, highlight the desired item and click  D/C Item . For discontinued promotional items, the system displays a checkmark in the D/C column of the promotion.

NOTE: To re-enable promotional pricing on an item which has been discontinued from the promotion, highlight it and click on the D/C Item button again.



Deleting a Complete Promotion

Situations may arise which require the deletion of promotions in their entirety. Perhaps a promotion was added erroneously, such as where the wrong transmission file was used to build the promotion.

Deletion of a full promotion is possible, however caution is recommended. Once a promotion has been deleted, all of the relevant item sales information from the promotion will be deleted and is not recoverable.

To delete an entire promotion, load the promotion onscreen.

Click on the  icon to delete the promotion.

 **NOTE:** Exercise caution when using the Delete icon. The system will NOT prompt for confirmation before deleting the promotion.

Zero Promotion Totals

In Promotion Maintenance, one final modification is available – the ability to zero promotional sales totals.

Start by loading the promotion for onscreen review.

To then zero the sales totals for all items on the promotion, click on the  icon.

 **NOTE:** This option requires a password which must be obtained from the TELUS Health Solutions Support Team.

 **NOTE:** When promotional sales totals are zeroed, all item sales information tied to the promotion will be discarded from the system including revenues, costs, item sales quantities and margins. Once cleared this information is not recoverable.

Promotions and Sales

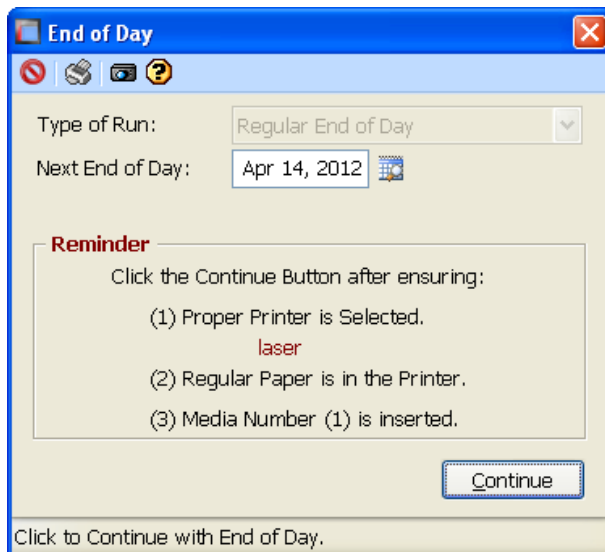
The idea of promotions is to offer, in most cases for a limited time, special sale pricing for products and/or to offer special point rewards to loyal customers.

Depending how clients are buying product, promotions may be applied differently. In most cases, items are purchased at a conventional till and are rung in for each walk-in customer who arrives. For stores using Assyst HME or who invoice clients with P-Type invoices in the Accounts Receivable, the usage of promotions is applied in a similar fashion.

This section focuses on promotions and their impact at the till, however the principles discussed are equally applicable to Assyst HME or P-Type invoices.

Activation of Promotions

The system manages the active status of promotions through the End of Day process.



When the End of Day process runs on the server, a prompt appears requesting the Next End of Day date.

It is necessary to ensure that the next End of Day date is entered correctly if the End of Day process is run manually. If you are unsure, select the date using the (Calendar) icon.

This date will determine which promotions are to be activated for the next business day.

In the above example, the system will activate all promotions set to be active on the 14th of December. The default setting for this option is the next calendar day. If the store is not going to be open on the next calendar day, or an end of day will not be run on that date, it is necessary to indicate the next business day at this time.

Let's say the store will be closed for one week and not open again until the 21st of December. The next End of Day date would need to be set as December 21st to ensure that the proper promotions are enabled.

Some promotions may have Start and/or End dates between the current date and the Next End of Day date. Setting this option correctly ensures that the proper promotions are either activated or deactivated as required and will ensure that the proper mix of regular and promotional pricing will be used by the system when the store opens on December 21st.

NOTE: If End of Day processes are automated, the End of Day will automatically run 7 days a week as long as the server is turned on, regardless of whether the store has been open or not.



Promotional Sales at the Till

Items on promotion are set up to automatically take effect on a particular date, and automatically turn off when the last effective date of the promotion expires. As discussed in the preceding section, the proper activation and deactivation of promotions depends on the regular and correct execution of the End of Day process.

When an item is scanned at the till and is determined to be part of an active promotion, the system automatically pulls the lowest available promotional price. If a product appears on multiple active promotions, the lowest price will always be pulled by the system.

The screenshot displays the Assyst Accu-Till software interface. At the top left is the TELUS logo with the tagline 'health solutions backed by Emergis'. The top right section shows 'Telus Health Solutions', the date 'Mon, May 28/12', and the time '1:37'. Below this, a large teal banner displays 'KIT KAT BAR' and '* .89'. To the right of the banner, the text 'Register: 01' and 'Cashier: Jen' is visible. A central white box contains a list of scanned items, currently showing 'KIT KAT BAR * .89 B'. To the right of this box are input fields for 'A/R #' and 'Loy #'. At the bottom left, a small box shows 'KIT KAT B * .89'. At the bottom right, a large teal box displays the total price '\$.97'.

In the above example, the Kit Kat product may appear on one or more valid promotions. The system is able to examine the available promotional pricing and gives the customer the best available price for the item.

The presence of an asterisk (*) to the left of the price of an item scanned indicates that the product price listed comes from a promotion.

The system will handle the pricing calculations identically for loyalty and non-loyalty customers if the promotion is not limited to loyalty customers only. If the Members Only flag is selected, the promotion will only apply to members of the store's loyalty program and may be subject to additional point rewards or redemptions.



A Complex Scenario – Non Discountable Promotions and Seniors' Discounts

A scenario may exist where a product appears on a non-discountable promotion. However, a seniors' discount may be applied to the item at the till by way of performing an Action 32 on the transaction if it is regularly discountable.

The system is able to give the customer the best possible price on the item even though it is on a non-discountable promotion. The till compares the regular retail price less the seniors' discount to the promotional price. If the promotional price is greater than the regular retail price less the seniors' discount, the system will allow the item to be sold for the lower value.

This scenario only allows the discount to be taken from the regular retail price for Action 32 transactions where the item is normally discountable.

For an example of this scenario, and an illustration of the results, consult Appendix A of this guide entitled "Troubleshooting and Frequently Asked Questions (FAQ)".

Loyalty Sales at the Till - Awarding Points

Where a sale is configured as Members Only, options exist for the award and redemption of a specific number of points for specific products.

When point rewards are earned, the system automatically calculates them based on the settings on the applicable loyalty clubs as well as taking into account any promotional point rewards. The cashier does not see any prompt or option as the system automatically awards points in the following manner:

Assyst Accu-Till

TELUS health solutions backed by Emergis

Telus Health Solutions
Mon, May 28/12 3:14

CHANGE DUE .00

KIT KAT BAR	* .89 B	Register: 01
COKE DIET CAN	.75 B	Cashier: Jen
Loyalty Points!	9	
Bonus Points Earned:	20	
Points Balance:	10541	
sub-total	1.64	
PST	.08	
GST# 123456789-	.08	A/R #: 5151
TOTAL: ->	1.80	Loy #: JP 10003
CASH	1.80	
CHANGE DUE	.00	

TOTAL SALE:
\$1.80

\$1.80

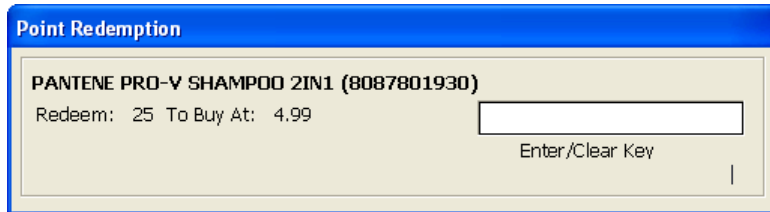
In the above scenario, 16 regular points resulting from a regular loyalty club are awarded. An additional 20 bonus points are awarded as set in the promotion, where the Points column for the item contains the value of 20.



Loyalty Sales at the Till – Redeeming Points

With respect to promotions, it is possible to set a special price with a negative number of points to be rewarded.

For example, UPC 8087801930 for PANTENE PRO-V SHAMPOO 2IN1 (375mL) is set in a promotion to have special pricing in conjunction with a negative point reward.

A screenshot of a software dialog box titled "Point Redemption" with a blue header bar. The main area has a light beige background. It displays the text "PANTENE PRO-V SHAMPOO 2IN1 (8087801930)" in bold. Below this, it shows "Redeem: 25 To Buy At: 4.99". To the right of this text is a white rectangular input field. Below the input field is the text "Enter/Clear Key".

At the till, the cashier will see the prompt pictured to the left.

Pressing **Enter** at this time will redeem the 25 points indicated to receive the special price of \$4.99. On the promotion, the Points column on the line containing this item contains a value of -25.

If **Clear** is pressed at this prompt, the points will not be redeemed and the regular retail price will apply.

Promotion Reporting

Assyst Point of Sale's Promotion module may be used to generate reports related to promotional sales, including setup and expiry checklists.

This section discusses reporting tools available in Assyst Point of Sale relevant to promotions.

Unless otherwise specified, promotional reports may be found by selecting **Promotion** from the **Reports** option in the POS Functions ribbon group.

Samples of all reports discussed are available in Appendix B – Sample Reports.

Promotional Master List

The Promotional Master list may be used to provide basic information about the items listed on promotion.

The report output is limited to the basic information set for each item in a promotion including the Price, Cost, Gross Margin % (GM%) and Points if applicable.

Options for this report include the following **Ranges**:

Promotion # – Enter the range of promotion numbers to be included in the report. This option has both a start and an end setting to select the range. By default, all promotions are to be included.

Active Date – Enter the range of active dates to be included in the report. The system may select promotions for inclusion based on the active date(s) provided using a start and end Active Date range.

Further **Filter** options are also available:

Cost – Select **Average** to report costs based on Average Cost for each item, or **Promotion** to report costs based on the costs for each item as set on the promotion.

Report Sequence – Determines the order in which items will appear. Options are:

- Description
- Department and Family
- Units Sold
- Margin Percentage
- Dollars Sold
- UPC Code

Print UPCs – If selected, the report will show the UPC codes for each product. If deselected, only the product description(s) will be displayed.

All Table Items – Select this option to report details for all items on the promotion(s) regardless of whether the items are part of a promotional price table or not. Deselecting this option will limit the master list to items assigned to a promotional price table.

Screen or Printer – Select Screen to display the report onscreen, or Printer to send the report to the selected system printer.

Once satisfied with all settings, click on **Print** to generate the report to screen or printer as per the report options.



Promotion Summary

The Promotion Summary is primarily used as a means to review sales information for one or more promotions including sales units, dollars, cost of sales, and gross margin dollars and percentages earned.

This report may include a summary by Promotion, enabling the separation of each promotion for analysis or by Item, enabling the system to summarize sales data for all promotions by item.

Options for this report include the following **Ranges**:

Promotion # – Enter the range of promotion numbers to be included in the report. This option has both a start and an end setting to select the range. By default, all promotions are to be included.

Active Date – Enter the range of active dates to be included in the report. The system may select promotions for inclusion based on the active date(s) provided using a start and end Active Date range.

Further **Filter** options are also available:

Cost – Select **Average** to report costs based on Average Cost for each item, or **Promotion** to report costs based on the costs for each item as set on the promotion.

Report Sequence – Determines the order in which items will appear. Options are:

- Description
- Department and Family
- Units Sold
- Margin Percentage
- Dollars Sold
- UPC Code

Report By – Select **Promotion** to group results by promotion, or select **Item** to group results by the UPC/item.

All Table Items – Select this option to report details for all items on the promotion(s) regardless of whether the items are part of a promotional price table or not. Deselecting this option will limit the master list to items assigned to a promotional price table.

Screen or Printer – Select Screen to display the report onscreen, or Printer to send the report to the selected system printer.

Once satisfied with all settings, click on **Print** to generate the report to screen or printer as per the report options.

Promotion Re-Order

The Promotion Re-Order report may be used to identify products with a high sell-through for the purposes of restocking.

The report provides such information as regular and sale pricing, onhands, and summary sellthrough for items over the promotional period as well as for the preceding 12 months. Additionally, if the product stock level has reached zero on any item, the system provides the date in which the store Ran Out.

Options for this report include the following **Ranges**:

Promotion # – Enter the range of promotion numbers to be included in the report. This option has both a start and an end setting to select the range. By default, all promotions are to be included.



Active Date – Enter the range of active dates to be included in the report. The system may select promotions for inclusion based on the active date(s) provided using a start and end Active Date range.

Further **Filter** options are also available:

Cost – Select **Average** to report costs based on Average Cost for each item, or **Promotion** to report costs based on the costs for each item as set on the promotion.

Report Sequence – Determines the order in which items will appear. Options are:

- Description
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- Units Sold
- Margin Percentage
- Dollars Sold
- UPC Code

Report By – Select **Promotion** to group results by promotion, or select **Item** to group results by the UPC/item.

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All Table Items – Select this option to report details for all items on the promotion(s) regardless of whether the items are part of a promotional price table or not. Deselecting this option will limit the master list to items assigned to a promotional price table.

Screen or Printer – Select Screen to display the report onscreen, or Printer to send the report to the selected system printer.

Once satisfied with all settings, click on **Print** to generate the report to screen or printer as per the report options.

Promotion Expiry

The Promotion Expiry report may be used to plan merchandising for the purpose of discontinuing promotions. This report provides a listing by promotion or summarized by item including onhands, sell through and pricing information.

If an item appears on a promotion and is to be activated on a new promotion upon expiry of the listed promotion, information about the new promotion is provided in the report.

Options for this report include the following **Ranges**:

Promotion # – Enter the range of promotion numbers to be included in the report. This option has both a start and an end setting to select the range. By default, all promotions are to be included.

Active Date – Enter the range of active dates to be included in the report. The system may select promotions for inclusion based on the active date(s) provided using a start and end Active Date range.

Further **Filter** options are also available:

Cost – Select **Average** to report costs based on Average Cost for each item, or **Promotion** to report costs based on the costs for each item as set on the promotion.



Report Sequence – Determines the order in which items will appear. Options are:

- Description
- Department and Family
- Units Sold
- Margin Percentage
- Dollars Sold
- UPC Code

Report By – Select **Promotion** to group results by promotion, or select **Item** to group results by the UPC/item.

Print UPCs – If selected, the report will show the UPC codes for each product. If deselected, only the product description(s) will be displayed.

All Table Items – Select this option to report details for all items on the promotion(s) regardless of whether the items are part of a promotional price table or not. Deselecting this option will limit the master list to items assigned to a promotional price table.

Screen or Printer – Select Screen to display the report onscreen, or Printer to send the report to the selected system printer.

Once satisfied with all settings, click on **Print** to generate the report to screen or printer as per the report options.

Promotion Startup

The Promotion Startup report may be used as a pre-planning aid for purchasing and merchandising where a promotion is about to begin.

The report provides ordering information, pricing, and onhands for each included product to aid in pre-sale planning.

Options for this report include the following **Ranges**:

Promotion # – Enter the range of promotion numbers to be included in the report. This option has both a start and an end setting to select the range. By default, all promotions are to be included.

Active Date – Enter the range of active dates to be included in the report. The system may select promotions for inclusion based on the active date(s) provided using a start and end Active Date range.

Further **Filter** options are also available:

Cost – Select **Average** to report costs based on Average Cost for each item, or **Promotion** to report costs based on the costs for each item as set on the promotion.

Report Sequence – Determines the order in which items will appear. Options are:

- Description
- Department and Family
- Units Sold
- Margin Percentage
- Dollars Sold
- UPC Code

Report By – Select **Promotion** to group results by promotion, or select **Item** to group results by the UPC/item.



Print UPCs – If selected, the report will show the UPC codes for each product. If deselected, only the product description(s) will be displayed.

All Table Items – Select this option to report details for all items on the promotion(s) regardless of whether the items are part of a promotional price table or not. Deselecting this option will limit the master list to items assigned to a promotional price table.

Screen or Printer – Select Screen to display the report onscreen, or Printer to send the report to the selected system printer.

Once satisfied with all settings, click on **Print** to generate the report to screen or printer as per the report options.

Additional Promotion Information

In addition to Promotional Reporting options, it is possible to get information from other sources within Assyst Point of Sale.

Department / Family / Class Promotional Analysis

There exist certain reports that can provide summary information about sales involving promotions in comparison to non-promotional sales during the same time period.

Daily Receipt Analysis

Report: Dept Promotional Analysis

Sort By: N/A Detail Level: N/A

Report Filters

Starting Date Of: Dec 6, 2011

Number of Days to Include: 7

Description Inc:

Ranges

	Start	End		Start	End
Dept:	0	9999	UR:	.00	999999.99
Group:	0	99	Margin %:	-999	999
Family:		ZZZZ	Promo #:		9999
Mfg:		ZZZZ	Onhand:	-9999999	9999999
Vendor:		ZZZZZZZZ	Counted:	00/00/0000	99/99/9999
Buyer/Rep:		ZZZZZZZZ	Register:		ZZ
Location:		ZZZZZZ	Cashier:		ZZZ
Pack Size:	.00	9999.99	Receipt #:	0	99999999
Class:	0	99			

Title:

Print To: ☒ Screen ☐ Printer

Continue

Choose Report to Print.



Depending on whether summaries are desired based on items' assignment to Departments, Families, or Classes, a different report might be used. All of these reports are all found among **Daily Receipt Analysis** reporting, found in the **Inventory** section of the **Reports** panel of the POS Functions ribbon group.

Within Daily Receipt Analysis, it is possible to select the report type as either a Department, Family or Class Promotional Analysis by selecting the **Report** type as one of the following three report types:

- Dept Promotional Analysis
- Family Promotional Analysis
- Class Promotional Analysis

To generate a Department, Family or Class promotional analysis for a specific date range, ensure that the **Starting Date Of** and **Number of Days to Include** options are set properly.

This report will result in a summary listing by department, family or class of all sales, and will provide summary information about regular sales as well as summary details about promotional sales.

For more information about Department, Family or Class Promotional Analysis reporting, please consult the Assyst Point of Sale Reports User Guide.

Item Integrity Reporting

The Daily Receipt Analysis Report contains an **Item Integrity** report type which may be used to search for sales resulting from specific promotions. This report may also be used to identify items sold on specific promotions.

This report may also be used to generate a purchase order for products based on the exact quantities sold.

To generate this information, ensure that the **Promo #** range is set to include items on the desired promotion numbers. **Starting Date Of** and **Number of Days to Include** may also be important if using the report to create a purchase order.

For more information on the Item Integrity report, please consult the Assyst Point of Sale Reports User Guide.

Inventory Valuation

Inventory Valuation may also be generated with results limited to inventory values for products on specific ranges of promotion numbers.

The **Valuation** report may be found in the **Inventory** section of the **Reports** panel within the POS Functions ribbon group.

To generate this information, use the **Promotion** options to indicate the range of promotion numbers to be evaluated.

For more information on the Inventory Valuation report, please consult the Assyst Point of Sale Reports user guide.

Item Movement Reporting

The Item Movement report may be used to generate details for all sales summarized by individual months. This report can be limited to provide total month over month sales for products offered within a range of promotion numbers. Sales values returned are not limited to the promotions.

The Item Movement report may be found in the **Inventory** section of the **Reports** panel within the POS Functions ribbon group.



The report may be used as a tool to prepare for a promotion by determining standard sellthrough.

To generate this report, ensure that the **Promo #** range is properly set to include only items contained on the desired promotions.

For more information on the Item Movement report, please consult the Assyst Point of Sale Reports user guide.

Item File Maintenance History

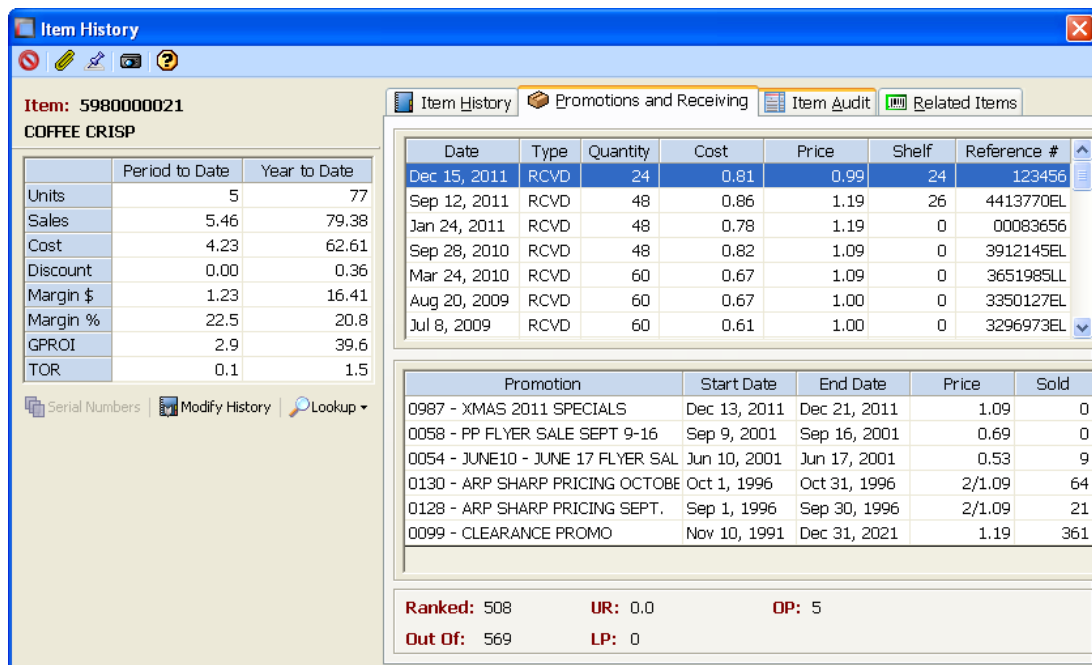
Promotional information may be obtained from the history section of any item record.

To open Item Maintenance, click on the **Item** icon located in the **Maintenance** panel of the POS Functions ribbon group.

The system will show a lookup screen. Find the item by entering the UPC, Wholesaler number, or search for the item using the description.

Once the item file has been loaded or selected from the list of options, click on the  **History** button.

Promotional sales history may be reviewed by selecting the **Promotions and Receiving** tab.



Item History

Item: 5980000021
COFFEE CRISP

	Period to Date	Year to Date
Units	5	77
Sales	5.46	79.38
Cost	4.23	62.61
Discount	0.00	0.36
Margin \$	1.23	16.41
Margin %	22.5	20.8
GPROI	2.9	39.6
TOR	0.1	1.5

Serial Numbers | Modify History | Lookup

Date	Type	Quantity	Cost	Price	Shelf	Reference #
Dec 15, 2011	RCVD	24	0.81	0.99	24	123456
Sep 12, 2011	RCVD	48	0.86	1.19	26	4413770EL
Jan 24, 2011	RCVD	48	0.78	1.19	0	00083656
Sep 28, 2010	RCVD	48	0.82	1.09	0	3912145EL
Mar 24, 2010	RCVD	60	0.67	1.09	0	3651985LL
Aug 20, 2009	RCVD	60	0.67	1.00	0	3350127EL
Jul 8, 2009	RCVD	60	0.61	1.00	0	3296973EL

Promotion	Start Date	End Date	Price	Sold
0987 - XMAS 2011 SPECIALS	Dec 13, 2011	Dec 21, 2011	1.09	0
0058 - PP FLYER SALE SEPT 9-16	Sep 9, 2001	Sep 16, 2001	0.69	0
0054 - JUNE10 - JUNE 17 FLYER SAL	Jun 10, 2001	Jun 17, 2001	0.53	9
0130 - ARP SHARP PRICING OCTOBE	Oct 1, 1996	Oct 31, 1996	2/1.09	64
0128 - ARP SHARP PRICING SEPT.	Sep 1, 1996	Sep 30, 1996	2/1.09	21
0099 - CLEARANCE PROMO	Nov 10, 1991	Dec 31, 2021	1.19	361

Ranked: 508 UR: 0.0 OP: 5
Out Of: 569 LP: 0

The system displays a list of promotions on which the item has appeared, including the promotion price, quantity sold, and the dates of the promotion. Promotions appear in reverse chronological order.

All sales history, including non-promotional sales, is available for review by clicking on the **Item History** tab.

When the **Item History** option is selected, the system shows month by month sales information for the item as well as period to date and year to date sales-related information for the item. This information includes all sales including non-promotional sales.

For more information on Item Maintenance, please consult the Assyst Point of Sale Item Maintenance user guide.



Appendices

Appendix A – Troubleshooting & Frequently Asked Questions (FAQ)

A promotion set to start today is not working! Why not and how do I fix it?

The promotion may not have been properly activated by an End of Day process. Either the End of Day was not run or the wrong date was set as the Next End of Day.

To force the promotion to be activated, go into Promotion Maintenance and change the Starting date of the promotion by backdating it a single day (ie. if set to start on July 27, change it to start on July 26).

After changing the date and clicking on  Confirm the button, save the promotion and have all cashiers perform an 88 Action on all till lanes and restart the till program to complete activation of the promotion.

What happens if I attempt to give a customer a senior's discount where some items are on non-discountable promotions?

Assyst Point of Sale is able to calculate the best possible sale pricing for your client even where a 32 action (or Senior's discount) is applied. If a promotion is not discountable, then discounts may not be applied to the promotional price.

However, a situation may occur where the regular price less the applied discount may be less than the promotional price on an item which is regularly discountable.

Here is an example:

A product has a regular price of \$2.00, and is on sale for \$1.79 for a limited time.

The customer in question is eligible for seniors' discounts of 20%, which is applied to the sale of this item by way of the 32 action code at the till.

The system does the math:

Regular Price less Discount = \$2.00 – 20% of \$1.99 = \$2.00 - \$0.40 = \$1.60.

Regular Price less Discount (\$1.60) is less than the Sale Price (\$1.79).

Accordingly, the net price for the client appears as \$1.60. However, the content will appear somewhat differently due to the promotional price:

The system displays the promotional price when the item is scanned.

REVLON NAILSLICKS MINI RED	* 1.79	B
Senior's Discount	0.19	-
sub-total	1.60	
PST	.08	
GST# 123456789-0	.08	
TOTAL: ->	1.76	
CASH	5.00	
CHANGE DUE	3.24	

The Seniors' Discount specifically permits discounting below the promotional price, so the discount appearing as \$0.19 comes from the difference between the promotional price and the proper net discounted regular price available to the customer.

I want to import promotions from electronic files. How can I do this?

Depending on what banner, chain, or buying group your store is a member of, electronic download files may be available for you. Some vendors may also provide electronic promotion files.

Consult with a TELUS Health Solutions Support team member to discuss availability of electronic downloads and/or to obtain documentation relevant to promotions from your banner, chain, buying group, or vendor as apply to your specific needs.



Appendix B – Sample Reports

Promotional Master List

Presented in order of item Gross Margin Percentage.

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PROMOTION MASTER LIST					
FOR PROMOTION #:		02- 05	ACTIVE BETWEEN: 00/00/00-99/99/99		
		** SORTED BY Gross Margin %	(By Promotion)		
PROMOTION #:		0002-SUMMER SIZZLE 2010	RUNNING: 10/05/25-10/09/03		

DESCRIPTION & SIZE		PRICE	COST	GM%	POINTS

BAR JERSEY MILK		1.09	0.60	T	45.0
UPC: 613012					
BAR REESES PC (BX36)		1.09	0.60	T	45.0
UPC: 566393					
BAR ROMAN NOUGAT (40G)		1.09	0.60	T	45.0
UPC: 73					
CARAMILK 2 THICK (80G)		1.09	0.60	T	45.0
UPC: 4918					
DAIRY MILK DELIGHT (24 BOX)		1.09	0.60	T	45.0
UPC: 910672					
DASANI ESSENTIALS TANGERINE (591ML)		1.09	0.60	T	45.0
UPC: 673750					
GANONG PAL-O-MINE (55GNUT/FD)		1.09	0.60	T	45.0
UPC: 666593					
KINDER SURPRISE T48 (48X20G)		1.09	0.60	T	45.0
UPC: 620264					
KIT KAT CHUNKY (BOX 24) (55GM)		1.09	0.60	T	45.0
UPC: 5980021692					
MALTED MILK (48G)		1.09	0.60	T	45.0
UPC: 611692					
PEP BAR (BOX 18)		1.09	0.60	T	45.0
UPC: 611372					
REESE HONEY/ROAST (1EA)		1.09	0.60	T	45.0
UPC: 566513					
BAR ALM&TOFFEE CHIPS (BX36)		0.84	0.60		28.6
UPC: 2578					
BAR COOKIES N CR (BX36)		0.84	0.60		28.6
UPC: 2561					
BAR KIT KAT CHUNKY (BX24)		0.84	0.60		28.6
UPC: 2576					
BAR SMARTIES (BX48)		0.84	0.61		27.4
UPC: 2579					
EAT MORE (56G)		0.84	0.61		27.4
UPC: 2580					
BAR SNICKERS SNGL (48)		0.84	0.62		26.2
UPC: 2581					
BAR MALTED MILK (BX24)		0.77	0.60		22.1
UPC: 2562					
BAR MR BIG (BX36)		0.77	0.60		22.1
UPC: 2575					
HER ALMOND BAR (43G)		0.77	0.60		22.1
UPC: 2577					
BAR DREAM (BX24)		0.77	0.68		11.7
UPC: 2563					

PROMOTIONAL TOTAL:		22 ITEMS	21.20	13.32	37.2
GRAND TOTAL:		22 ITEMS	21.20	13.32	37.2



Promotion Summary

By Promotion, sorted by Description.

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PROMOTIONAL SUMMARY								
FOR PROMOTION #:		48- 48		ACTIVE BETWEEN: 00/00/00-99/99/99				
		** SORTED BY Product Description		(By Promotion)				
PROMOTION #:		0048-LOYALTY PROMOTION		RUNNING: 10/05/31-10/07/31				

UPC CODE	DESCRIPTION & SIZE	UNITS	SALES	COST	GROSS	MARGIN		

613012	BAR JERSEY MILK	0	0.00	0.00 T	0.00	0.0		
566393	BAR REESES PC(BX36)	0	0.00	0.00 T	0.00	0.0		
73	BAR ROMAN NOUGAT(40G)	0	0.00	0.00 T	0.00	0.0		
4918	CARAMILK 2 THICK(80G)	0	0.00	0.00 T	0.00	0.0		
671850	COKE CLASSIC(600/591ML) (591ML)	0	0.00	0.00	0.00	0.0		
672990	COKE WITH LIME(591 ML)	0	0.00	0.00	0.00	0.0		
910672	DAIRY MILK DELIGHT(24 BOX)	0	0.00	0.00 T	0.00	0.0		
666593	GANONG PAL-O-MINE(55GNUT/FD)	0	0.00	0.00 T	0.00	0.0		
611012	JERSEY MILK(45G) (45G)	0	0.00	0.00 T	0.00	0.0		
620264	KINDER SURPRISE T48(48X20G)	0	0.00	0.00 T	0.00	0.0		
598033	KIT KAT (45GM)	2	1.78	1.24 T	0.54	30.3		
5980021692	KIT KAT CHUNKY(BOX 24) (55GM)	0	0.00	0.00 T	0.00	0.0		
611692	MALTED MILK(48G)	0	0.00	0.00 T	0.00	0.0		
8087802015	PANTENE 2/1 HYDRAT(400ML) (1HY)	2	11.98	10.02	1.96	16.4		
8087801967	PANTENE 2/1 MST RENW(400ML) (1MS)	0	0.00	0.00	0.00	0.0		
8087802256	PANTENE CND CLAS CAR(375ML)	0	0.00	0.00	0.00	0.0		
611372	PEP BAR(BOX 18)	0	0.00	0.00 T	0.00	0.0		
566513	REESE HONEY/ROAST (1EA)	0	0.00	0.00 T	0.00	0.0		

Tables:	NESTLE BARS	13 ITEMS	2	1.78	1.24	0.54	30.3	
PROMOTIONAL TOTAL:			4.00	13.76	11.26 T	2.50	18.2	
GRAND TOTAL:			4.00	13.76	11.26 T	2.50	18.2	



Promotion Re-Order

Summarized by promotion, sorted by Description.

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PROMOTIONAL RE-ORDER LIST

FOR PROMOTION #: 48- 48

ACTIVE BETWEEN: 00/00/00-99/99/99

** SORTED BY Product Description (By Promotion)

PROMOTION #: 0048-LOYALTY PROMOTION

RUNNING: 10/05/31-10/07/31

DESCRIPTION	ORDER #	LAST 12		REG. PRICE	PROMO PRICE	PRIOR QUANTITY RECEIVED	ONHAND	SOLD	DATE RAN OUT
BAR JERSEY MILK UPC: 613012	223149	39	3.3	1.19	0.89	08/10/28	24	9	0
BAR REESES PC (BX36) UPC: 566393	807735	40	3.3	1.19	0.89	08/08/15	36	28	0
BAR ROMAN NOUGAT (40G) UPC: 73		422	35.2	1.19	0.89	08/04/17	36	0	0
CARAMILK 2 THICK (80G) UPC: 4918		0	0.0	1.19	0.89			0	0
COKE CLASSIC (600/591ML) UPC: 671850	87814	897	74.8	1.59	1.59	10/05/18	24	134	0
COKE WITH LIME (591 ML) UPC: 672990		0	0.0	1.49	1.49			0	0
DAIRY MILK DELIGHT (24 BOX) UPC: 910672		40	3.3	1.19	0.89			0	0
GANONG PAL-O-MINE (55GNUT/FD) UPC: 666593	691097	601	50.1	1.19	0.89	08/12/30	36	52	0
JERSEY MILK (45G) UPC: 611012		190	15.8	1.19	0.89	08/09/19	46	0	0
KINDER SURPRISE T48 (48X20G) UPC: 620264	537977	1960	163.3	1.19	0.89	08/12/19	48	118	0
KIT KAT UPC: 598033	414847	378	31.5	1.19	0.89	10/02/24	24	137	2
KIT KAT CHUNKY (BOX 24) UPC: 5980021692	414839	350	29.2	1.19	0.89	10/02/24	24	88	0
MALTED MILK (48G) UPC: 611692	462655	391	32.6	1.19	0.89	08/12/12	24	25	0
PANTENE 2/1 HYDRAT (400ML) UPC: 8087802015	169219	26	2.2	6.99	5.99	09/04/17	1	5	2
PANTENE 2/1 MST RENW (400ML) UPC: 8087801967	169300	53	4.4	6.99	5.99	08/12/30	3	2	0
PANTENE CND CLAS CAR (375ML) UPC: 8087802256	182766	16	1.3	6.99	5.99	08/12/18	1	3	0
PEP BAR (BOX 18) UPC: 611372		489	40.8	1.19	0.89	08/12/12	18	20	0
REESE HONEY/ROAST UPC: 566513	759282	64	5.3	1.19	0.89	08/12/12	36	44	0



Promotion Expiry

Sorted by Description, By Promotion

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PROMOTIONAL EXPIRY LIST

FOR PROMOTION #: 00-9999

EXPIRING BETWEEN: 10/07/01-10/07/31

** SORTED BY Product Description (By Promotion)

PROMOTION #: 0003-TEMP PROMO

RUNNING: 10/07/25-10/07/31

DESCRIPTION	ORDER #	UR.	PRIOR QUANTITY RECEIVED	PROMO PRICE	---NEW--- PRICE	#	ONHAND	SOLD	DATE RAN OUT
KIT KAT (45GM) UPC: 598033	414847	0.0	10/02/24 24	0.89	1.19		137	0	

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PROMOTIONAL EXPIRY LIST

FOR PROMOTION #: 00-9999

EXPIRING BETWEEN: 10/07/01-10/07/31

** SORTED BY Product Description (By Promotion)

PROMOTION #: 0048-LOYALTY PROMOTION

RUNNING: 10/05/31-10/07/31

DESCRIPTION	ORDER #	UR.	PRIOR QUANTITY RECEIVED	PROMO PRICE	---NEW--- PRICE	#	ONHAND	SOLD	DATE RAN OUT
BAR JERSEY MILK UPC: 613012	223149	0.0	08/10/28 24	0.89	1.09	0002	9	0	
BAR REESES PC(BX36) UPC: 566393	807735	0.0	08/08/15 36	0.89	1.09	0002	28	0	
BAR ROMAN NOUGAT(40G) UPC: 73		0.0	08/04/17 36	0.89	1.09	0002	0	0	
CARAMILK 2 THICK(80G) UPC: 4918		0.0		0.89	1.09	0002	0	0	
COKE CLASSIC(600/591ML) (591ML) UPC: 671850	87814	0.0	10/05/18 24	1.59	1.59		134	0	
COKE WITH LIME(591 ML) UPC: 672990		0.0		1.49	1.49		0	0	
DAIRY MILK DELIGHT(24 BOX) UPC: 910672		0.0		0.89	1.09	0002	0	0	
GANONG PAL-O-MINE(55GNUT/FD) UPC: 666593	691097	0.0	08/12/30 36	0.89	1.09	0002	52	0	
JERSEY MILK(45G) (45G) UPC: 611012		0.0	08/09/19 46	0.89	1.19		0	0	
KINDER SURPRISE T48(48X20G) UPC: 620264	537977	0.0	08/12/19 48	0.89	1.09	0002	118	0	
KIT KAT (45GM) UPC: 598033	414847	0.0	10/02/24 24	0.89	1.19		137	2	
KIT KAT CHUNKY(BOX 24) (55GM) UPC: 5980021692	414839	0.0	10/02/24 24	0.89	1.09	0002	88	0	
MALTED MILK(48G) UPC: 611692	462655	0.0	08/12/12 24	0.89	1.09	0002	25	0	
PANTENE 2/1 HYDRAT(400ML) (1HY) UPC: 8087802015	169219	0.0	09/04/17 1	5.99	6.99		5	2	
PANTENE 2/1 MST RENW(400ML) (1MS) UPC: 8087801967	169300	0.0	08/12/30 3	5.99	6.99		2	0	
PANTENE CND CLAS CAR(375ML) UPC: 8087802256	182766	0.0	08/12/18 1	5.99	6.99		3	0	
PEP BAR(BOX 18) UPC: 611372		0.0	08/12/12 18	0.89	1.09	0002	20	0	
REESE HONEY/ROAST (1EA) UPC: 566513	759282	0.0	08/12/12 36	0.89	1.09	0002	44	0	



Promotion Startup

Sorted by Description, by Promotion.

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PROMOTIONAL STARTUP LIST										
FOR PROMOTION #: 00-9999		STARTING BETWEEN: 10/05/01-10/05/07								
		** SORTED BY Product Description (By Promotion)								
PROMOTION #: 0397-BANNER PROMOTION		RUNNING: 10/05/01-10/09/01								

DESCRIPTION	ORDER #	UR.	PRIOR QUANTITY RECEIVED	REGULAR PRICE	PROMOTIONAL PRICE	#	ONHAND	SOLD	DATE RAN OUT	

AA4 DURA COPPERTOP(1.5 VOLT) UPC: 4133341501	174474	0.0	08/12/12 24	5.99	3.99	397	22	0		
ADVIL CD/SN PLS CAP (ADVIL) UPC: 6210700422	787358	0.0	08/12/03 2	16.39	12.99	397	3	0		
ADVIL CPLT(100 CAPS) UPC: 6210700416	702498	0.0	08/12/31 8	13.99	9.49	397	6	0		
ADVIL GEL CPLT(72) UPC: 6210700482	571877	0.0	08/12/31 8	13.99	9.49	397	11	0		
ADVIL TB 200MG 100 (120PK) UPC: 6210700409	900969	0.0	08/12/31 8	13.99	9.49	397	8	0		
AERIUS TABLETS(5MG 20TBS) UPC: 5621932420	377606	0.0	08/12/11 1	23.39	19.99	397	2	0		
BAN/BT ALOE AFT SUN(BANANABOAT) UPC: 7965600942	281881	0.0	08/07/07 2	9.99	7.99	397	1	0		
BAN/BT ALOE VERA GEL(460ML) UPC: 7965600114	889717	0.0		7.99	5.99	397	0	0		
BAN/BT KIDS SPF30(BAN/BT180) UPC: 7965600944	282442	0.0	08/06/24 6	9.99	7.99	397	0	0		
BAN/BT OIL DRK #4(240ML) UPC: 7965600025	542738	0.0	08/07/08 3	10.99	7.99	397	0	0		
BAN/BT SNSCR #15(240ML) UPC: 7965600244		0.0	08/06/11 2	10.99	7.99	397	0	0		
BAN/BT SPORT SFF30(BAN/BT180) UPC: 7965600943	281972	0.0	08/07/10 6	9.99	7.99	397	0	0		
BAN/BT SPT #30(240ML) UPC: 7965600248	099994	0.0		10.99	7.99	397	0	0		
BAN/BT TAN OIL SPF15(240ML) UPC: 7965600402	697938	0.0		9.99	7.99	397	0	0		
BAN/BT TAN SPRAY 4(180ML) UPC: 7965600873	907337	0.0	08/07/07 2	9.99	7.99	397	0	0		
BAN/BT ULT PLS 50(240ML) UPC: 7965600341	099804	0.0	08/07/08 3	10.99	7.99	397	0	0		
BENADRYL CPLT 25MG(24) UPC: 6009326571	963447	0.0	08/12/31 2	9.49	7.99	397	9	0		
BENADRYL CPLT NT/TM(12 50MG) UPC: 6009326512	045054	0.0	08/10/06 2	9.99	7.99	397	3	0		
BENADRYL EX/ST TOTAL(20 CAPS) UPC: 6024526690	661033	0.0	08/12/11 1	10.49	7.99	397	2	0		
BENADRYL LIQ CHLD(100ML) UPC: 6009326580	194076	0.0	08/12/30 2	7.69	6.99	397	4	0		
C2 DURA COPTOP(1.5 VOLT) UPC: 4133321401	173633	0.0	08/12/12 18	5.99	3.99	397	18	0		
CALC MAGN CPLT JAM(100+100) UPC: 6464202673	378489	0.0	08/12/09 3	9.99	6.49	397	3	0		
CALC MAGN&VIT D JAM(100+100) UPC: 6464202674		0.0	08/12/18 5	9.99	6.49	397	4	0		
CALC MAGN+ZINC JAM(100+100) UPC: 6464202902		0.0	08/10/30 2	9.99	6.49	397	3	0		

