

# Chapter 2.15: Period Discount Pricing

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## Introduction

The *Period Discount Pricing* option allows you to offer your customers discounts and free products based on a preset number of items purchased. This option differs from other discounting options offered in Route Manager in that *Period Discount Pricing* allows the customer to qualify for discounts or free goods over an established period of time, and not per transaction.

With *Period Discount Pricing*, there are many options and configurations available, and this chapter will guide you through the complete process.

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## Overview

The *Period Discount Pricing* option offers two standard discounting methods:

- ▶ **Free Product:** Customers can receive free items based on an established quantity of items, or group of items, purchased within the allotted period.
- ▶ **Product Discount:** Customers can receive a discount based on an established quantity of items, or group of items, purchased within the allotted period.

After you have decided the discounting method you will use, there are additional options to choose from; for example, you can choose between discounting an individual item or groups of items. Additionally, you can establish the length of time that purchases will qualify for a discount.

Each option available is discussed within this document.

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## Desktop Setup

Depending on the type of *Period Discount Pricing* method you will use, the following changes to the program may be required:

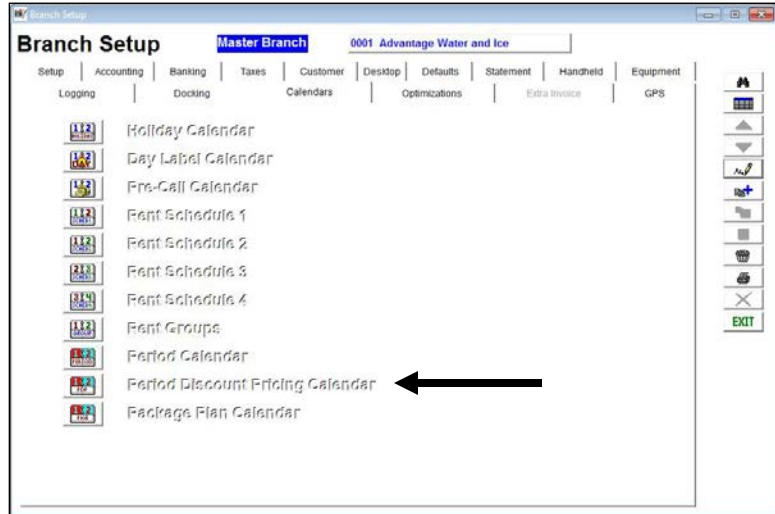
- ▶ **Setup Period Discount Pricing Calendar (Optional):** The standard discounting feature enabled in the system uses *Monthly, Quarterly,* or *Annual* discount periods. Alternatively, use this option if you would like to offer discounts to your customers over a customized length of time.
- ▶ **Create Product Group Codes (Optional):** This option will allow you to group items together, which will allow the customer to qualify for discounts based on a group of items purchased — not individually.
- ▶ **Discount Product Charge Code (Required):** A product code will need to be added to your product list that will be used for discounting item prices.
- ▶ **Additional Discount Product Charge Code (Optional):** An additional product code can be added to handle any discounts offered that are not part of a standard price reduction on items (e.g., rentals, handling fees).
- ▶ **Add Period Discount Pricing List (Required):** This required option allows you to establish your *Period Discount Pricing* lists in the program.

Refer to each section that applies to your selected discount pricing method.

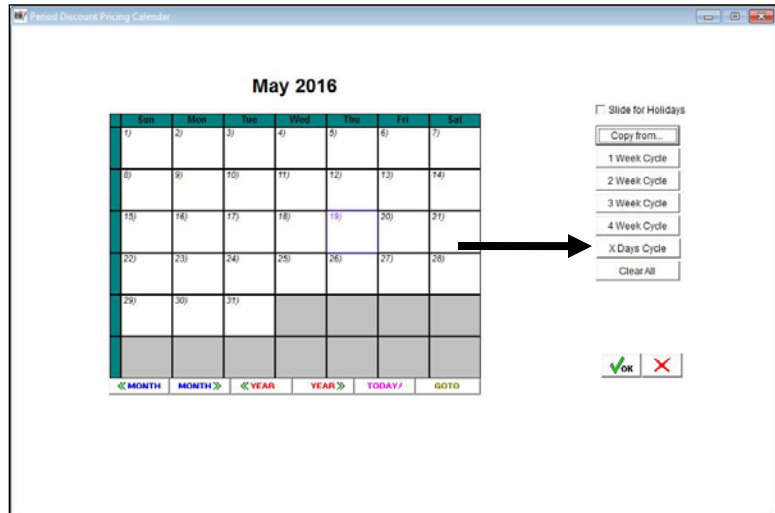
## Period Discount Pricing Calendar

The *Period Discount Pricing Calendar* allows you to establish a custom cycle that will be used when generating period discounts.

Navigate to *File > Branch Setup > Calendars*, and click on the *Period Discount Pricing Calendar* option.

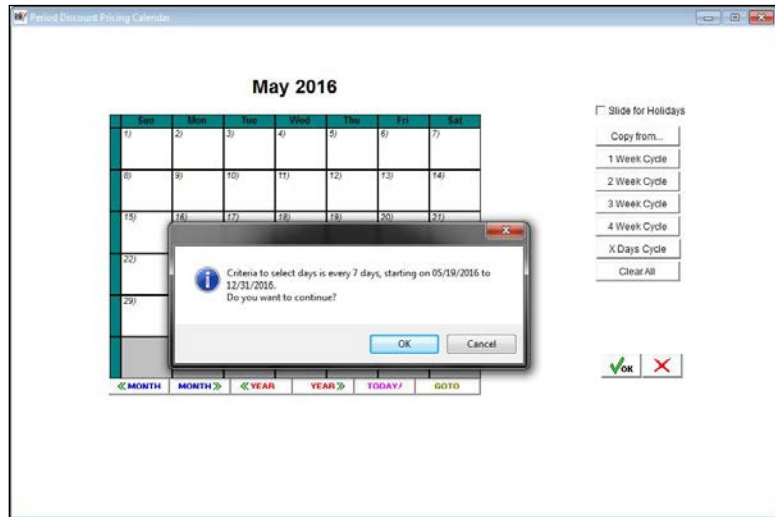


The calendar allows you to create 1-4 week cycles, as well as a custom number of days (*X Days Cycle*).

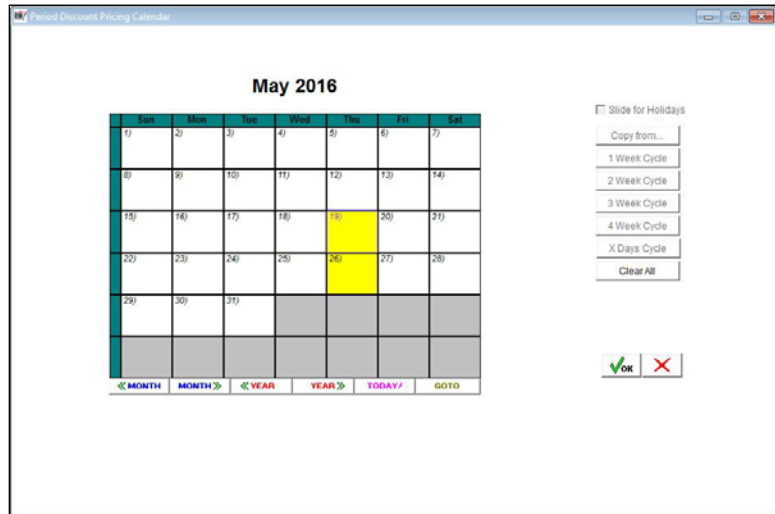


To create a new cycle, select the desired 'Cycle' button, and click on the date that you would like the cycle to begin:

**NOTE:** If you would like your new cycle to slide around established holidays within the *Holiday Calendar*, check the option 'Slide for Holidays' on the screen prior to choosing your cycle.



After a selection has been made, the calendar will be updated to reflect the chosen cycle:



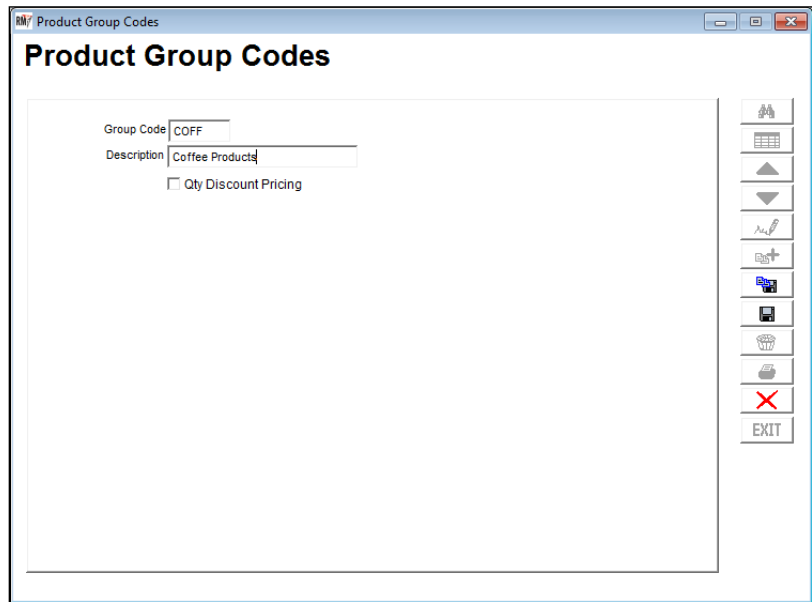
**NOTE:** In this example, *1 Week Cycle* has been selected, and is set to begin on Thursday, May 19.

Click **OK** to save the new calendar and exit the screen.

## Product Group Codes

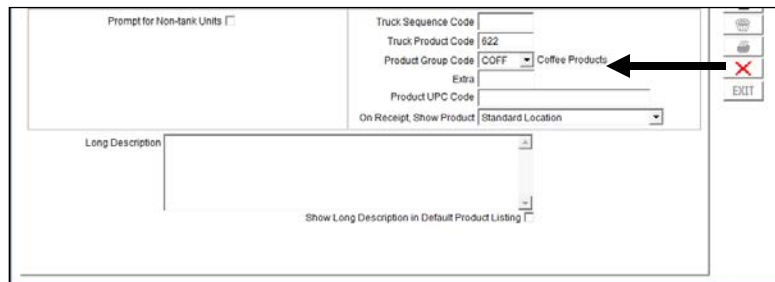
You can add *Product Group Codes* to the system if you would like to offer discounts or free goods for groups of items purchased, and not just individual items.

Navigate to *Lists > Product Codes > Product Group Codes*, and add all of the product groups you would like to use to the system.



After you have added the *Product Group Codes*, they will need to be assigned to each item from within the *Product Charge Codes* screen.

Navigate to *Lists > Product Codes > Product Charge Codes*, and select the *Handheld* tab. In **Modify** mode, add the related group code to the product within the *Product Group Code* field.



## Discount Product Charge Code

A new *Product Charge Code* will need to be added to the program to handle discounted totals. The new code will be used to apply a credit to the customer's account when applicable.

Follow the steps below to create the new product code.

1. Navigate to *Lists > Product Codes > Product Charge Codes* and select the **Add** button.
2. Enter a *Charge Code ID* and *Description* for the code (e.g., Promo Credit).
3. Select the *Pricing* tab and choose a non-taxable tax category for the item.
4. Complete the setup process by selecting the *Accounting* tab and choosing a *Product Class* and *G/L Number*.
5. Click **Save**.

### **Additional Discount Product Charge Code**

An additional discount product code can be added to the program if you would like to offer an additional discount to any *Period Discount Code*. This option can be used for including an additional flat rate discount of your choice to any plan offered. For example, this can be used for crediting a rental amount or handling fee.

Follow the steps listed in the *Discount Product Charge Code* section above to create the new product code.

## Period Discount Pricing List

The *Period Discount Pricing* screen is used to create and manage each active promotion, and can be found under *Lists > Product Codes* within RMA.

Three example promotions are created in the following section to illustrate the different configuration options available.

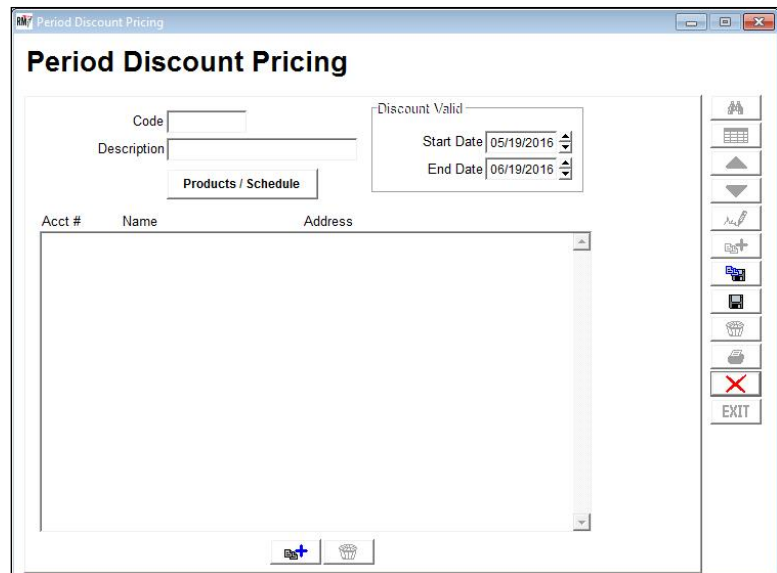
- ▶ **Example 1:** This scenario details a free product promotion.
- ▶ **Example 2:** This scenario details a standard discount promotion.
- ▶ **Example 3:** This scenario details a custom discount promotion that includes the custom calendar, and additional discounting features.

Refer to each example that applies to your company.

### **Example 1: Free Product Promotion**

Customers assigned to this promotion will receive a free 5-gallon bottle of water for every 10 bottles that are purchased in one month.

1. Choose the **Add** key.



2. Enter a *Code* and *Description* for the promotion.

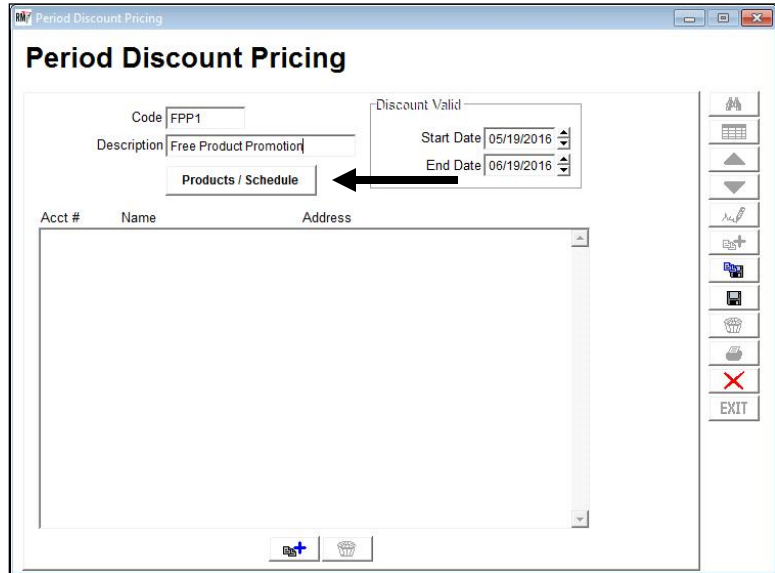
The screenshot shows the 'Period Discount Pricing' window. At the top, the title is 'Period Discount Pricing'. Below the title, there are several input fields: 'Code' with the value 'FPP1', 'Description' with the value 'Free Product Promotion', 'Discount Valid' section containing 'Start Date' (05/19/2016) and 'End Date' (06/19/2016). A 'Products / Schedule' button is located below the description field. Below these fields is a table with columns 'Acct #', 'Name', and 'Address', which is currently empty. On the right side, there is a vertical toolbar with various icons and an 'EXIT' button at the bottom. At the bottom of the window, there are two small icons: a plus sign and a trash can.

3. Adjust the *Start Date* and *End Date* to control the valid dates of the promotion.

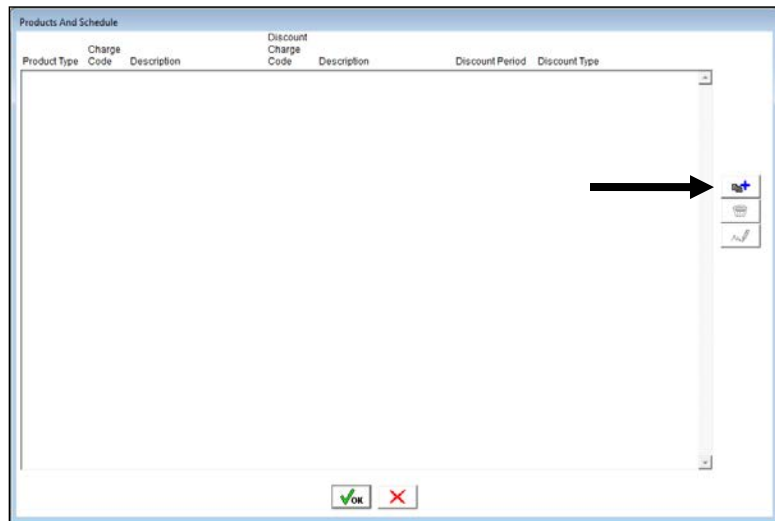
This screenshot is identical to the one above, showing the 'Period Discount Pricing' window. The 'Code' is 'FPP1' and the 'Description' is 'Free Product Promotion'. The 'Discount Valid' section shows 'Start Date' as 05/19/2016 and 'End Date' as 06/19/2016. A black arrow points from the 'Description' field to the 'Start Date' field. The rest of the interface, including the empty table and the toolbar, remains the same.



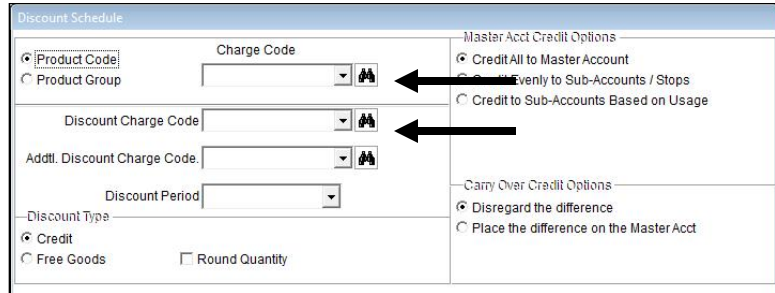
- Select the 'Products / Schedule' key to enter the product details of the promotion.



- Select the **Add** key on the right side of the screen.

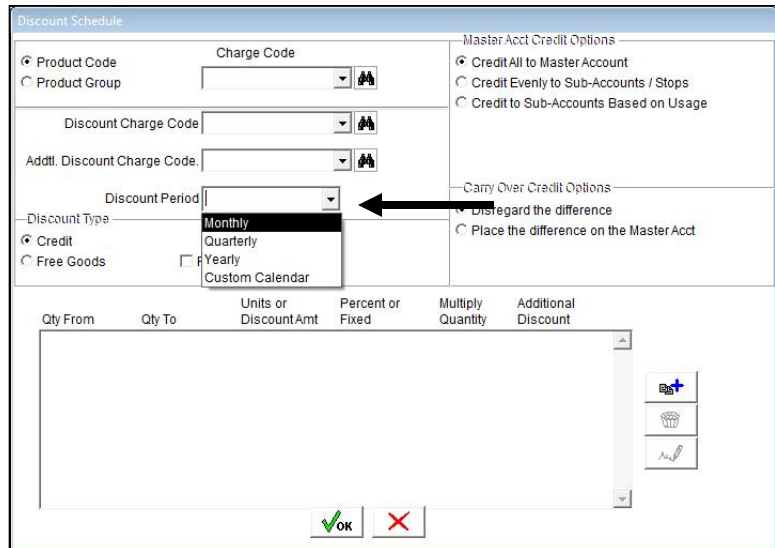


- Select the item that will qualify for the promotion within the *Charge Code* field. Additionally, select the *Discount Charge Code* created in the previous section.



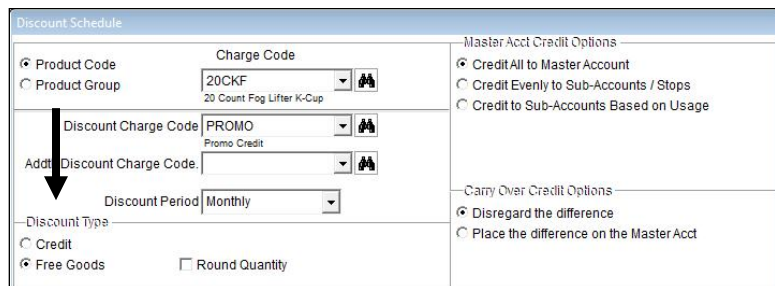
The screenshot shows the 'Discount Schedule' form. The 'Product Code' radio button is selected. The 'Charge Code' dropdown is set to '20CKF'. The 'Discount Charge Code' dropdown is set to 'PROMO'. The 'Discount Period' is set to 'Monthly'. The 'Discount Type' has 'Credit' selected. The 'Master Acct Credit Options' section has 'Credit All to Master Account' selected. Arrows point to the 'Charge Code' and 'Discount Charge Code' dropdowns.

- Select the *Discount Period* you would like to use. Promotion goods or discounts will be calculated based on sales during a month, quarter, year, or custom calendar. In this case, *Monthly* is used.



The screenshot shows the 'Discount Schedule' form with the 'Discount Period' dropdown menu open. The 'Monthly' option is highlighted. The 'Discount Type' has 'Credit' selected. The 'Master Acct Credit Options' section has 'Credit All to Master Account' selected. An arrow points to the 'Monthly' option in the dropdown menu.

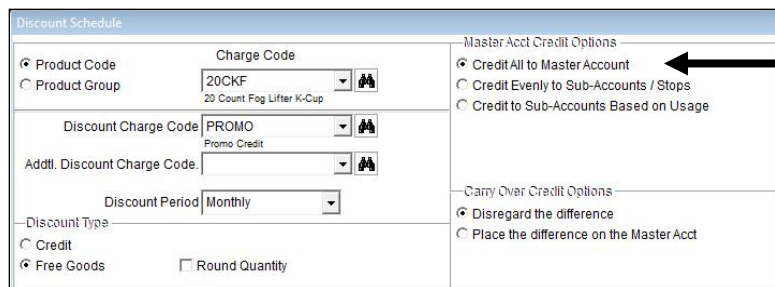
- Within the *Discount Type* field, select **Free Goods**.



The screenshot shows the 'Discount Schedule' form. The 'Product Code' radio button is selected. The 'Charge Code' dropdown is set to '20CKF'. The 'Discount Charge Code' dropdown is set to 'PROMO'. The 'Discount Period' is set to 'Monthly'. The 'Discount Type' has 'Free Goods' selected. The 'Master Acct Credit Options' section has 'Credit All to Master Account' selected. An arrow points to the 'Free Goods' radio button.

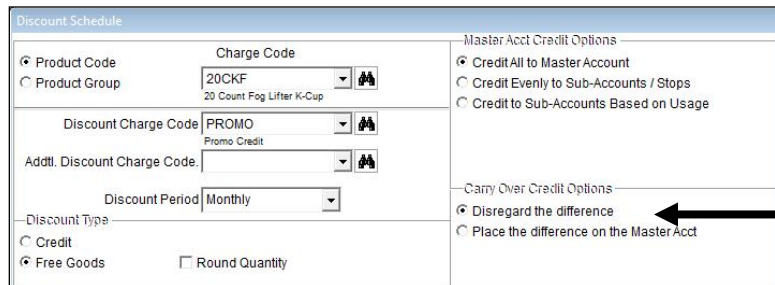
**NOTE:** Select the *Round Quantity* option if you would like the system to round to the nearest whole number when partial quantities exist; otherwise, decimals will be ignored.

9. The *Master Acct Credit Options* field contains items that apply to promotions earned on *Master Billed* accounts, select one of the following:
- ▶ **Credit All to Master Account:** Choose this option to credit all promotions to the *Master Account* on a *Master Billed* account.
  - ▶ **Credit Evenly to Sub-Accounts / Stops:** Choose this option to distribute all promotions between Sub-Accounts on Master Billed accounts.
  - ▶ **Credit to Sub-Accounts Based on Usage:** Choose this option to distribute the credit to Sub-Accounts that purchased the most items on Master Billed accounts.



The screenshot shows the 'Discount Schedule' form. In the 'Master Acct Credit Options' section, the 'Credit All to Master Account' radio button is selected and highlighted with a black arrow.

10. The *Carry Over Credit Options* field contains items that apply to any credit differences remaining after they have been distributed evenly, select one of the following:
- ▶ **Disregard the Difference:** Choose this option to drop any remaining values.
  - ▶ **Place the difference on the Master Acct:** Select this option to apply the remaining values to the *Master Account*.



The screenshot shows the 'Discount Schedule' form. In the 'Carry Over Credit Options' section, the 'Disregard the difference' radio button is selected and highlighted with a black arrow.

11. Select the **Add** key to establish the promotion quantity rules.

Qty From	Qty To	Units or Discount Amt	Percent or Fixed	Multiply Quantity	Additional Discount

12. Enter the minimum (*Qty From*) and maximum (*Qty To*) quantities that will qualify for the promotion. In this case, the customer will not receive a free item until ten items have been purchased. This is considered the base rule. Click **OK** after establishing the base rule.

Qty From:

Qty To:

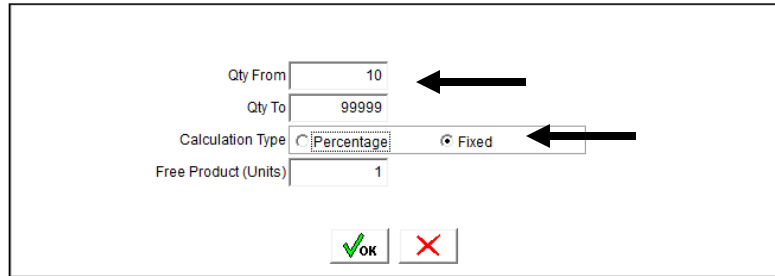
Calculation Type:  Percentage  Fixed

Free Product as % of Quantity Sold:

13. Click **Add** again to establish additional quantity discount rules:

Qty From	Qty To	Units or Discount Amt	Percent or Fixed	Multiply Quantity	Additional Discount
1	99999		0.000%	F	0.000%

14. Enter the additional quantity figures and select the *Fixed* option.



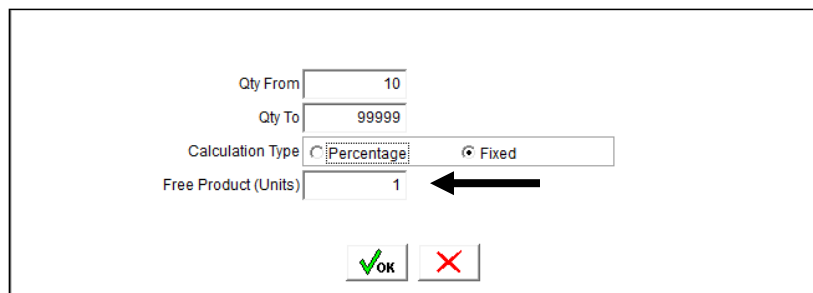
Qty From

Qty To

Calculation Type  Percentage  Fixed

Free Product (Units)

15. Enter the number of promotional items that will be given to the customer within the *Free Product (Units)* field.



Qty From

Qty To

Calculation Type  Percentage  Fixed

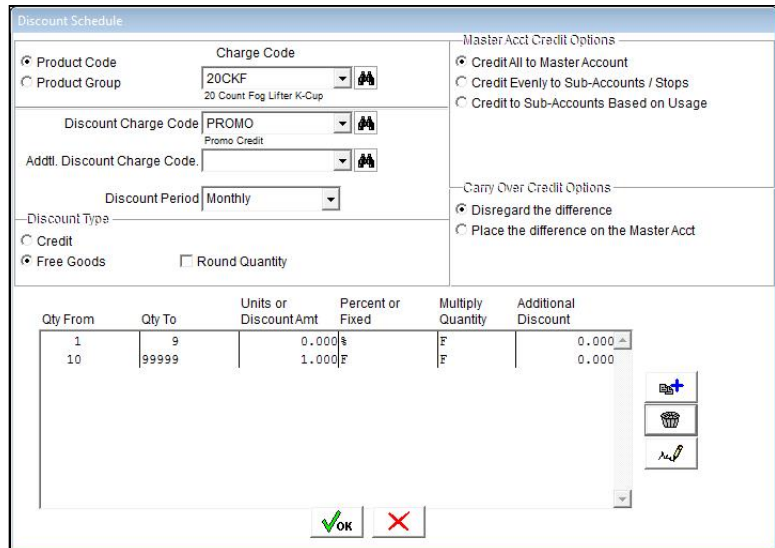
Free Product (Units)

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**NOTE:** This screen establishes that the customer will receive one free item after 10 or more have been purchased.

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16. Click **OK** to save the new rule. Repeat these steps until each tier of the promotion has been added.  
Here is an example of the completed promotion:



Discount Schedule

Product Code  
 Product Group

Charge Code: 20CKF  
20 Count Fog Lifter K-Cup

Discount Charge Code: PROMO  
Promo Credit

Adttl. Discount Charge Code:

Discount Period: Monthly

Discount Type:  
 Credit  
 Free Goods  Round Quantity

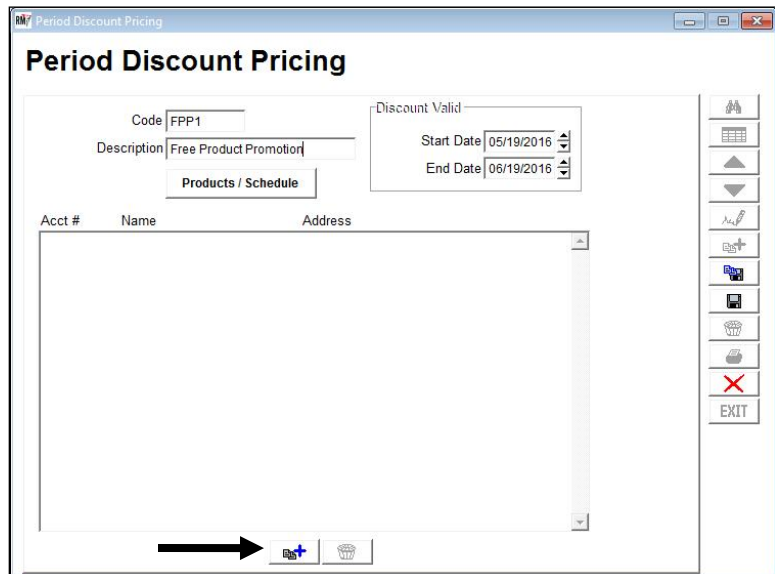
Master Acct Credit Options:  
 Credit All to Master Account  
 Credit Evenly to Sub-Accounts / Stops  
 Credit to Sub-Accounts Based on Usage

Carry Over Credit Options:  
 Disregard the difference  
 Place the difference on the Master Acct

Qty From	Qty To	Units or Discount Amt	Percent or Fixed	Multiply Quantity	Additional Discount
1	9	0.000	%	F	0.000
10	99999	1.000	F	F	0.000

OK X

17. Click **OK** to each window displayed until you return to the *Period Discount Pricing* screen.
18. Choose the **Add** key on the bottom portion of the screen.



Period Discount Pricing

Code: FPP1

Description: Free Product Promotor

Products / Schedule

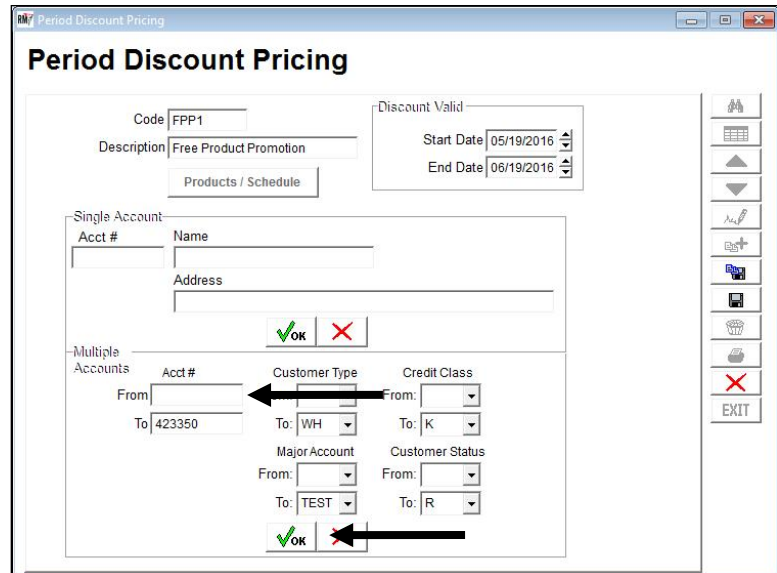
Discount Valid:  
 Start Date: 05/19/2016  
 End Date: 06/19/2016

Acct #	Name	Address

EXIT

➕

- Enter an account number or specify the account criteria in the *Multiple Accounts* field to assign the promotion to your customers, and click **OK**.



**Period Discount Pricing**

Code: FPP1  
 Description: Free Product Promotion  
 Discount Valid: Start Date 05/19/2016, End Date 06/19/2016

Single Account:  
 Acct #, Name, Address

Multiple Accounts:  
 From: [ ] To: 423350  
 Customer Type: From: [ ] To: WH  
 Credit Class: From: [ ] To: K  
 Major Account: From: [ ] To: TEST  
 Customer Status: From: [ ] To: R

Buttons: OK, X, EXIT

**NOTE:** In this example, all *Customer Type 'W'* accounts will be assigned to the promotion. Alternatively, customers can be assigned to a *Period Discount Pricing Code* within their account under *Lists > Customer Information > Credit*, on the *Billing/Statement* screen.

- Click **Save** or **More** to complete the process.



**Period Discount Pricing**

Code: FPP1  
 Description: Free Product Promotion  
 Discount Valid: Start Date 05/19/2016, End Date 06/19/2016

Acct #	Name	Address
000009	Willey Sheet M5	830 S Walnut Rd, Turlock, CA 95380
000010	ARS Office	3201 Liberty Square Pkwy, Turlock, CA 95380
000011	7-Eleven c:#13690	2470 Paseo Verde #100, Henderson, NV 89074
000012	7-Eleven c:#15829	2470 Paseo Verde #100, Henderson, NV 89074
000013	7-Eleven c:#22804	2470 Paseo Verde #100, Henderson, NV 89074
000014	7-Eleven c:#26174	2470 Paseo Verde #100, Henderson, NV 89074
000015	7-Eleven c:#29642	2470 Paseo Verde #100, Henderson, NV 89074
000016	7-Eleven c:#29644	2470 Paseo Verde #100, Henderson, NV 89074
000019	Santos Fab	1900 Acme Ct, Turlock, CA 95380
000020	Mohinder Sports	2225 N Nellis Suite C, Las Vegas, NV 89115
000021	American Tower Corp	1401 Mineral Ave, Las Vegas, NV 89106
000022	CosmoProf	5725 LOSEE RD, Suite #100, NORTH LAS VEGAS, NV 89130
000023	Perko's Cafe	150 Harvest Dr. #140, Burr Ridge, IL 60527
000025	Starbucks	6901 E Fish Lake Rd, Maple Grove, MN 55369
000026	California Dairies	2000 E Cheyenne, N. Las Vegas, NV 89030
000027	Certified Labs	1625 S Decatur, Las Vegas, NV 89102
000028	AM/PM	3230 E Flamingo #8-352, Las Vegas, NV 89112

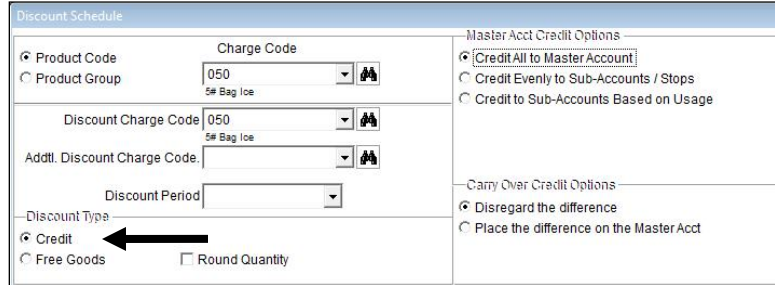
Buttons: +, OK, X, EXIT

This completes the setup process for a fixed product promotion.

### Example 2: 10% Discount Promotion

Customers assigned to this promotion will receive a 10% discount on each 5-gallon bottle of water if purchases exceed 15 (5-gallon) bottles in one month.

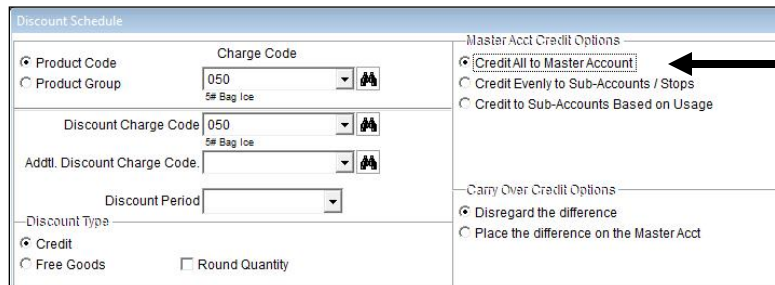
1. Complete **Steps 1-7** in the previous section.
2. Within the *Discount Type* field, select **Credit**.



The screenshot shows the 'Discount Schedule' form. The 'Discount Type' section has three radio buttons: 'Credit' (selected), 'Free Goods', and 'Round Quantity'. A black arrow points to the 'Credit' radio button. Other fields include 'Charge Code' (050), 'Discount Charge Code' (050), and 'Master Acct Credit Options' (Credit All to Master Account).

**NOTE:** Select the *Round Quantity* option if you would like the system to round to the nearest whole number when partial quantities exist; otherwise, decimals will be ignored.

3. The *Master Acct Credit Options* field contains items that apply to promotions earned on *Master Billed* accounts, select one of the following:
  - ▶ **Credit All to Master Account:** Choose this option to credit all promotions to the *Master Account* on a *Master Billed* account.
  - ▶ **Credit Evenly to Sub-Accounts / Stops:** Choose this option to distribute all promotions between Sub-Accounts on Master Billed accounts.
  - ▶ **Credit to Sub-Accounts Based on Usage:** Choose this option to distribute the credit to Sub-Accounts that purchased the most items on Master Billed accounts.

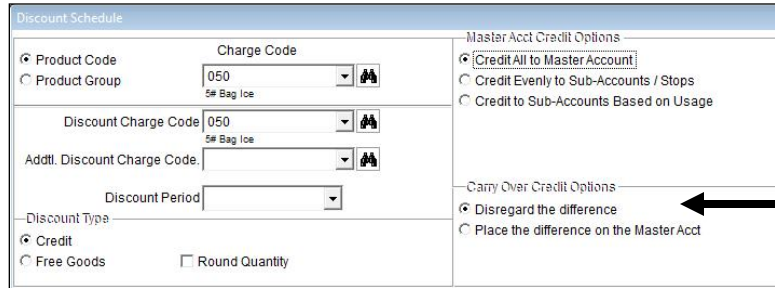


The screenshot shows the 'Discount Schedule' form with the 'Master Acct Credit Options' section. The 'Credit All to Master Account' radio button is selected, indicated by a black arrow. Other fields are the same as in the previous screenshot.



4. The *Carry Over Credit Options* field contains items that apply to any credit differences remaining after they have been distributed evenly, select one of the following:

- ▶ **Disregard the Difference:** Choose this option to drop any remaining values.
- ▶ **Place the difference on the Master Acct:** Select this option to apply the remaining values to the *Master Account*.



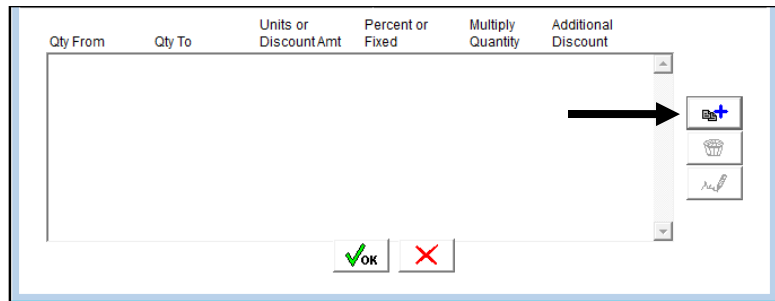
Discount Schedule

Product Code: 050 (5# Bag Ice)  
 Discount Charge Code: 050 (5# Bag Ice)  
 Addtl. Discount Charge Code:  
 Discount Period:  
 Discount Type: Credit (selected)  
 Round Quantity:

Master Acct Credit Options:  
 Credit All to Master Account  
 Credit Evenly to Sub-Accounts / Stops  
 Credit to Sub-Accounts Based on Usage

Carry Over Credit Options:  
 Disregard the difference  
 Place the difference on the Master Acct

5. Select the **Add** key to establish the promotion quantity rules.

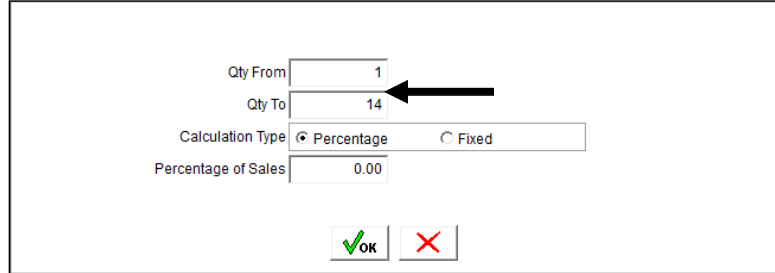


Qty From	Qty To	Units or Discount Amt	Percent or Fixed	Multiply Quantity	Additional Discount

Buttons: OK, X

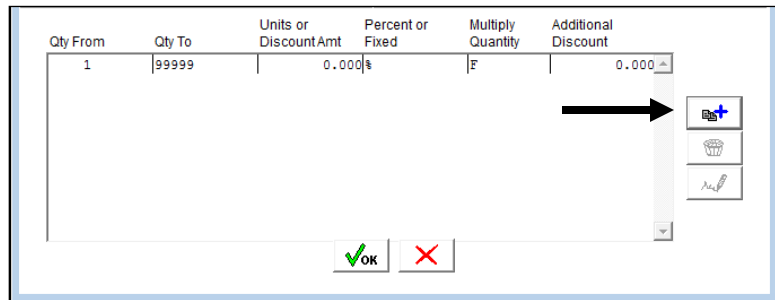
Toolbar: Add (+), Basket, Edit (pencil)

- Enter the minimum (*Qty From*) and maximum (*Qty To*) quantities that will qualify for the promotion. In this case, the customer will not receive a free item until 15 items have been purchased. This is considered the base rule. Click **OK** to add additional rules.



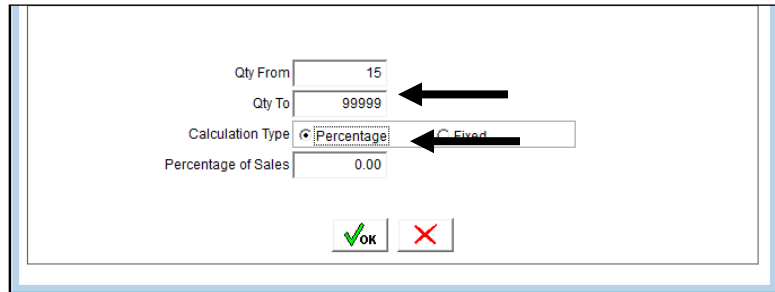
Qty From: 1  
 Qty To: 14  
 Calculation Type:  Percentage  Fixed  
 Percentage of Sales: 0.00

- Click **Add** again to establish additional quantity discount rules:



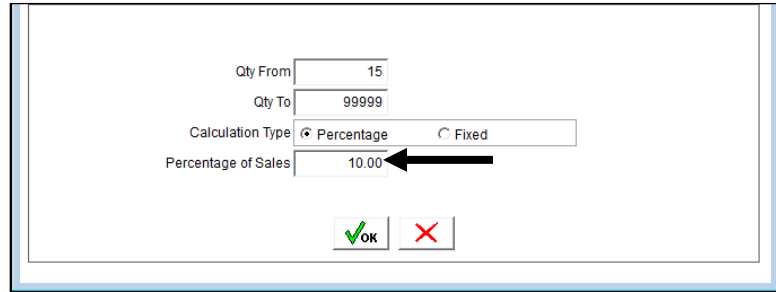
Qty From	Qty To	Units or Discount Amt	Percent or Fixed	Multiply Quantity	Additional Discount
1	99999	0.000\$	%	F	0.000

- Enter the additional quantity figures and select the *Percentage* option.



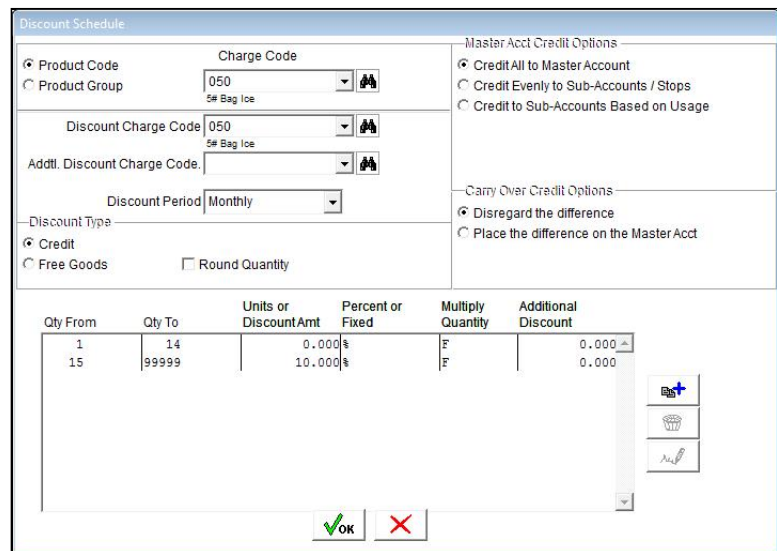
Qty From: 15  
 Qty To: 99999  
 Calculation Type:  Percentage  Fixed  
 Percentage of Sales: 0.00

- Enter the percentage discount that will be given to the customer within the 'Percentage of Sales' field:



Qty From: 15  
 Qty To: 99999  
 Calculation Type:  Percentage  Fixed  
 Percentage of Sales: 10.00

- Click **OK** to save the new rule. Repeat these steps until each tier of the promotion has been added.  
 Here is an example of the completed promotion:



Discount Schedule

Product Code:  Product Code  
 Charge Code: 050 (5# Bag Ice)  
 Discount Charge Code: 050 (5# Bag Ice)  
 Addtl. Discount Charge Code:  
 Discount Period: Monthly  
 Discount Type:  Credit  Free Goods  Round Quantity

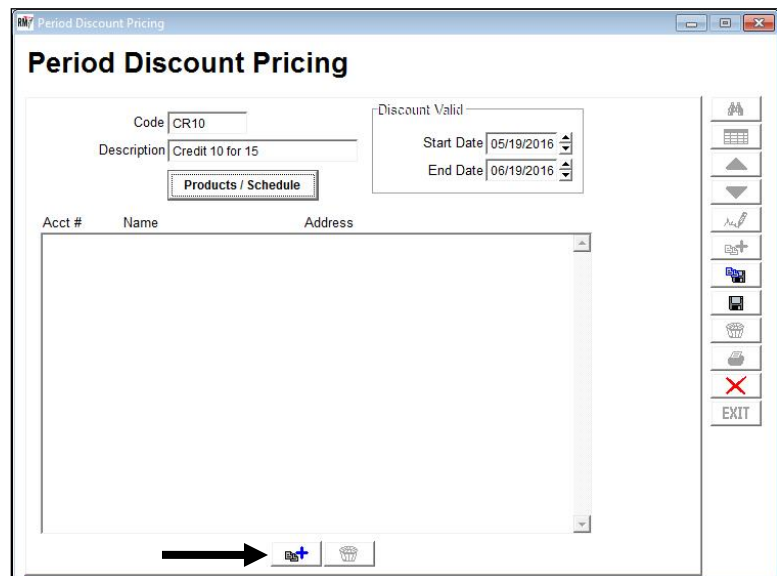
Master Acct Credit Options:  
 Credit All to Master Account  
 Credit Evenly to Sub-Accounts / Stops  
 Credit to Sub-Accounts Based on Usage

Carry Over Credit Options:  
 Disregard the difference  
 Place the difference on the Master Acct

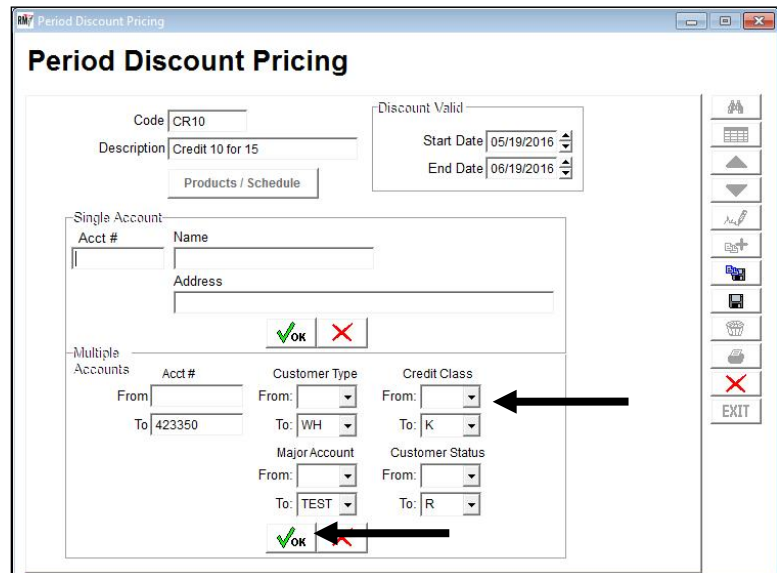
Qty From	Qty To	Units or Discount Amt	Percent or Fixed	Multiply Quantity	Additional Discount
1	14	0.000	%	F	0.000
15	99999	10.000	%	F	0.000

- Click **OK** to each window displayed until you return to the *Period Discount Pricing* screen.

- Choose the **Add** key on the bottom portion of the screen.

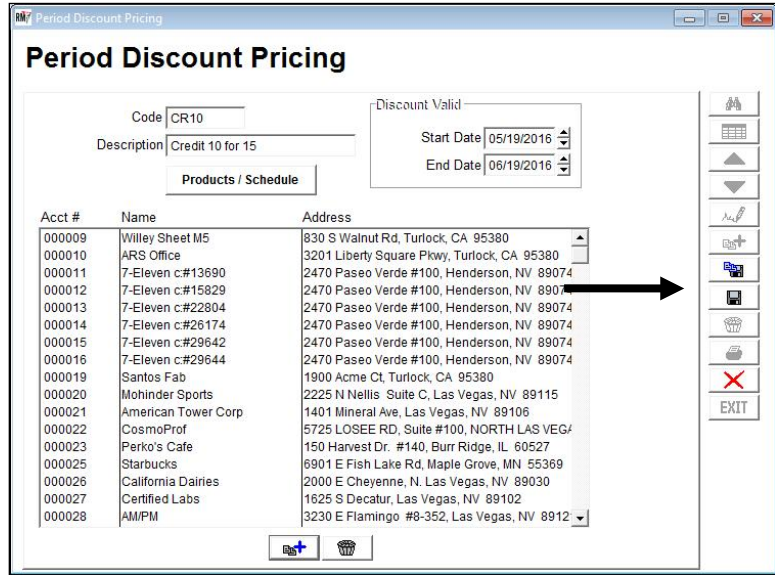


- Enter an account number or specify the account criteria in the *Multiple Accounts* field to assign the promotion to your customers, and click **OK**.



**NOTE:** In this example, all accounts will be assigned to the promotion. Alternatively, customers can be assigned a *Period Discount Pricing Code* within their account under *Lists > Customer Information > Credit*, on the *Billing/Statement* screen.

- Click **Save** or **More** to complete the process.



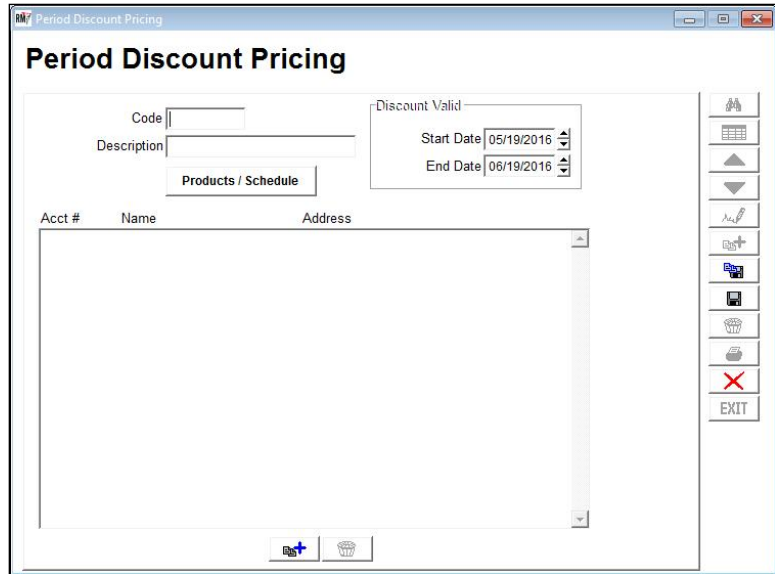
This completes the setup process for a discount product promotion.

### Example 3: Custom Promotion

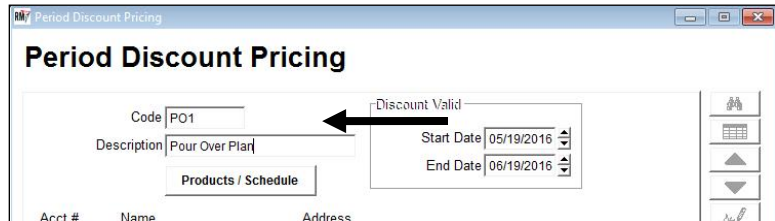
Customers assigned to this promotion will receive discounts and a free rental for purchasing an established level of items assigned to the same product group over an established timeframe.

Navigate to Lists > Product Codes > Period Discount Pricing.

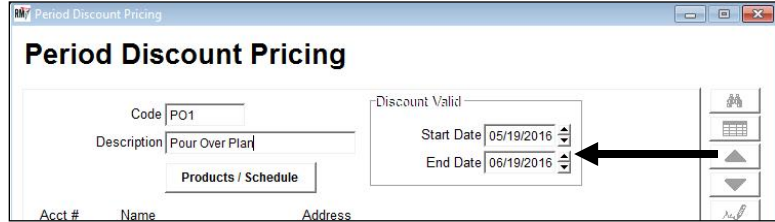
1. Choose the **Add** key.



2. Enter a *Code* and *Description* for the promotion.



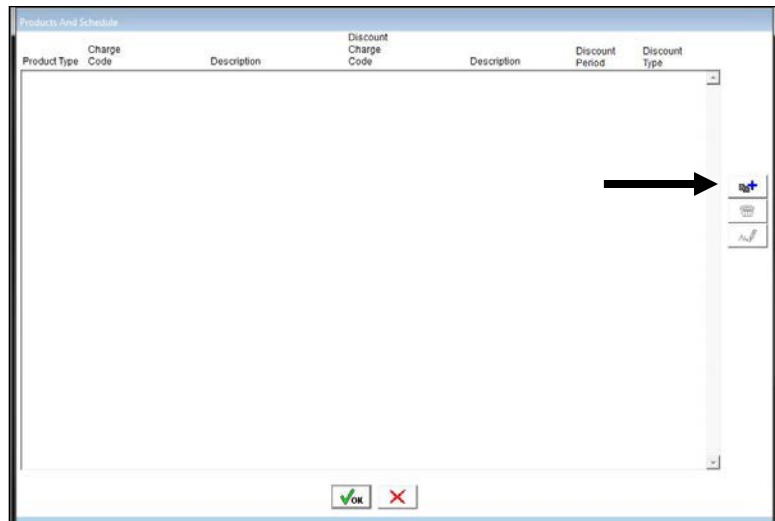
- Adjust the *Start Date* and *End Date* to control the valid dates of the promotion.



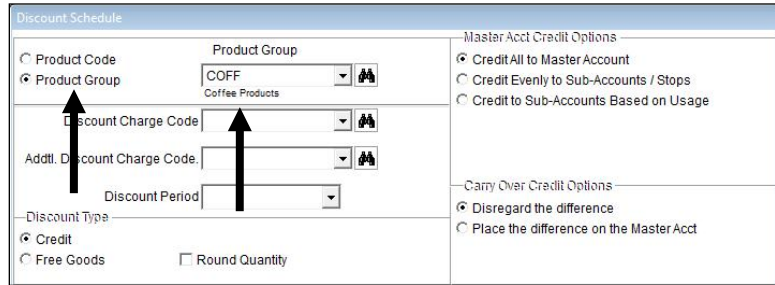
- Select the 'Products / Schedule' key to enter the product details of the promotion.



- Select the **Add** key on the right side of the screen.

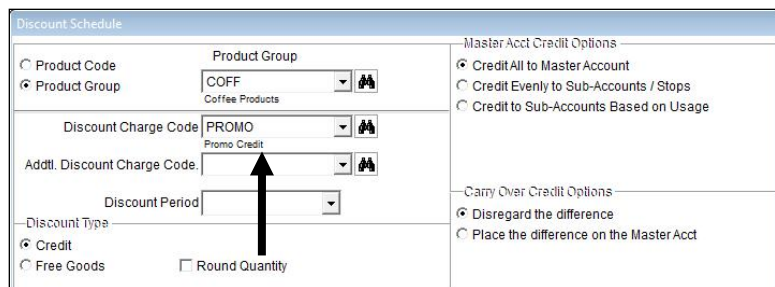


- Select the *Product Group* option, and choose the desired group from the drop-down list.



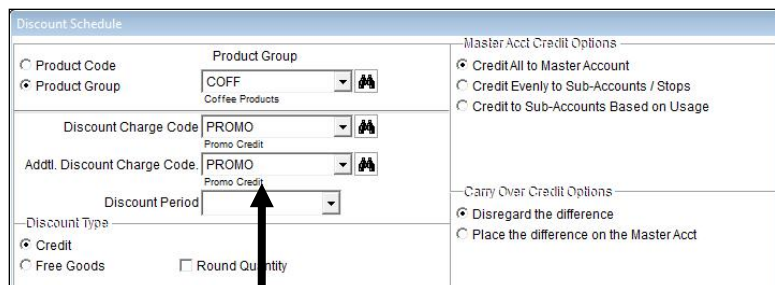
The screenshot shows the 'Discount Schedule' form. The 'Product Group' dropdown menu is open, showing 'COFF' and 'Coffee Products'. An arrow points to the 'Product Group' radio button, which is selected. Other fields include 'Discount Charge Code', 'Addtl. Discount Charge Code', 'Discount Period', and 'Discount Type' (with 'Credit' selected). On the right, 'Master Acct Credit Options' includes 'Credit All to Master Account', 'Credit Evenly to Sub-Accounts / Stops', and 'Credit to Sub-Accounts Based on Usage'. 'Carry Over Credit Options' includes 'Disregard the difference' and 'Place the difference on the Master Acct'. 'Free Goods' and 'Round Quantity' are also present.

- Select the charge code that will be used for applying discounts from within the *Discount Charge Code* drop-down list:



The screenshot shows the 'Discount Schedule' form. The 'Discount Charge Code' dropdown menu is open, showing 'PROMO' and 'Promo Credit'. An arrow points to the 'Discount Charge Code' dropdown menu. Other fields are the same as in the previous screenshot.

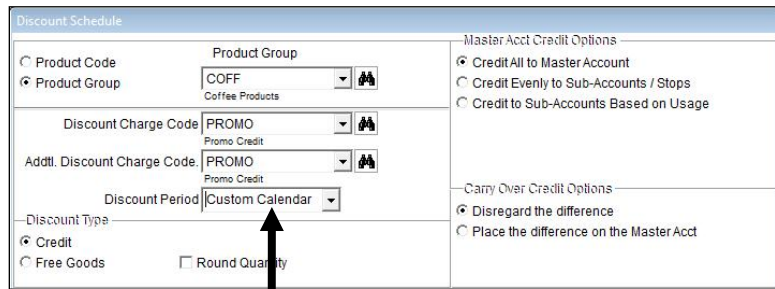
- Since this example will include an additional discount for a rental charge, the product code to use for the discount is selected within the *Addtl. Discount Charge Code* field:



The screenshot shows the 'Discount Schedule' form. The 'Addtl. Discount Charge Code' dropdown menu is open, showing 'PROMO' and 'Promo Credit'. An arrow points to the 'Addtl. Discount Charge Code' dropdown menu. Other fields are the same as in the previous screenshots.

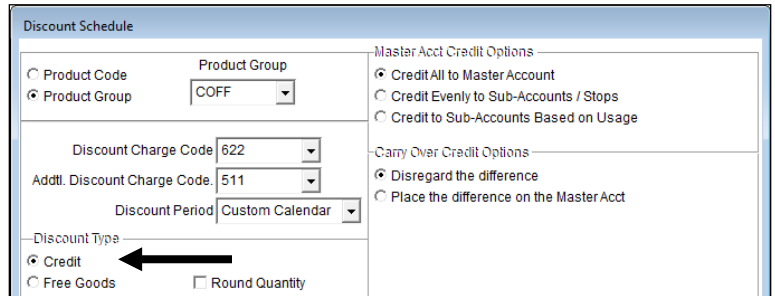


9. Select the *Discount Period* you would like to use. In this case, a custom schedule will be used:



The screenshot shows the 'Discount Schedule' form. The 'Product Group' is set to 'COFF' (Coffee Products). The 'Discount Charge Code' and 'Addtl. Discount Charge Code' are both set to 'PROMO' (Promo Credit). The 'Discount Period' dropdown menu is open, and an arrow points to the 'Custom Calendar' option. The 'Discount Type' is set to 'Credit'. The 'Round Quantity' checkbox is unchecked. On the right, 'Master Acct Credit Options' includes 'Credit All to Master Account', 'Credit Evenly to Sub-Accounts / Stops', and 'Credit to Sub-Accounts Based on Usage'. 'Carry Over Credit Options' includes 'Disregard the difference' and 'Place the difference on the Master Acct'.

10. This promotion will offer the customer a flat rate discount based on the number of items they purchase from the assigned *Product Group Code*. In this scenario, the *Discount Type* will be 'Credit'.

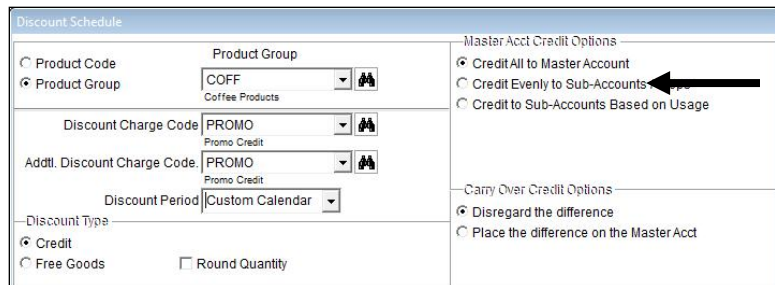


The screenshot shows the 'Discount Schedule' form. The 'Product Group' is set to 'COFF'. The 'Discount Charge Code' is '622' and the 'Addtl. Discount Charge Code' is '511'. The 'Discount Period' is set to 'Custom Calendar'. The 'Discount Type' is set to 'Credit', and an arrow points to the 'Credit' radio button. The 'Round Quantity' checkbox is unchecked. The 'Master Acct Credit Options' and 'Carry Over Credit Options' are the same as in the previous screenshot.

**NOTE:** Select the *Round Quantity* option if you would like the system to round to the nearest whole number when partial quantities exist; otherwise, decimals will be ignored.

11. The *Master Acct Credit Options* field contains items that apply to promotions earned on *Master Billed* accounts, select one of the following:

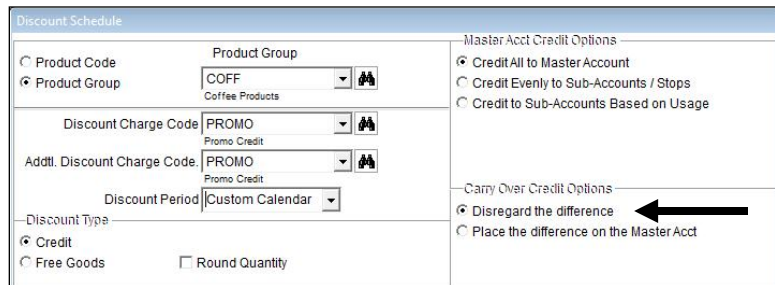
- ▶ **Credit All to Master Account:** Choose this option to credit all promotions to the *Master Account* on a *Master Billed* account.
- ▶ **Credit Evenly to Sub-Accounts / Stops:** Choose this option to distribute evenly all promotions between *Sub-Accounts* on *Master Billed* accounts.
- ▶ **Credit to Sub-Accounts Based on Usage:** Choose this option to distribute any credits to *Sub-Accounts* that purchased the most items on *Master Billed* accounts.



The screenshot shows the 'Discount Schedule' form. On the right side, under 'Master Acct Credit Options', three radio buttons are listed: 'Credit All to Master Account' (selected), 'Credit Evenly to Sub-Accounts / Stops', and 'Credit to Sub-Accounts Based on Usage'. A black arrow points to the selected option.




12. The *Carry Over Credit Options* fields contains items that apply to any credit differences remaining after they have been distributed evenly, select one of the following:

- ▶ **Disregard the Difference:** Choose this option to drop any remaining values.
- ▶ **Place the difference on the Master Acct:** Select this option to apply the remaining values on the *Master Account*.



The screenshot shows the 'Discount Schedule' form. On the right side, under 'Carry Over Credit Options', two radio buttons are listed: 'Disregard the difference' (selected) and 'Place the difference on the Master Acct'. A black arrow points to the selected option.

13. Select the **Add** key to establish the promotion quantity rules.




Qty From	Qty To	Units or Discount Amt	Percent or Fixed	Multiply Quantity	Additional Discount
<div style="text-align: right; margin-right: 20px;">    </div>					
<input type="button" value="OK"/> <input type="button" value="X"/>					

14. Enter the minimum (*Qty From*) and maximum (*Qty To*) quantities that will qualify for the promotion. In this case, the customer receives a standard price for purchasing between 1-12 items within the group. This is considered the base rule. Click **OK** to add additional rules.

Qty From	<input type="text" value="1"/>
Qty To	<input type="text" value="99999"/>
Calculation Type	<input checked="" type="radio"/> Percentage <input type="radio"/> Fixed
Percentage of Sales	<input type="text" value="0.00"/>
<input type="button" value="OK"/> <input type="button" value="X"/>	

15. Click **Add** again to establish additional quantity discount rules:

Qty From	Qty To	Units or Discount Amt	Percent or Fixed	Multiply Quantity	Additional Discount
1	99999	0.000%			0.000

16. Enter the additional quantity figures, and select the *Fixed* option. A '1.00' fixed discount is used in this example:

Qty From  ←

Qty To  ←

Calculation Type  Percentage  Fixed ←

Fixed Discount Amount   Multiply Discount Amount By Quantity

Additional Discount

17. Enter the discount amount within the *Fixed Discount Amount* field:

Qty From

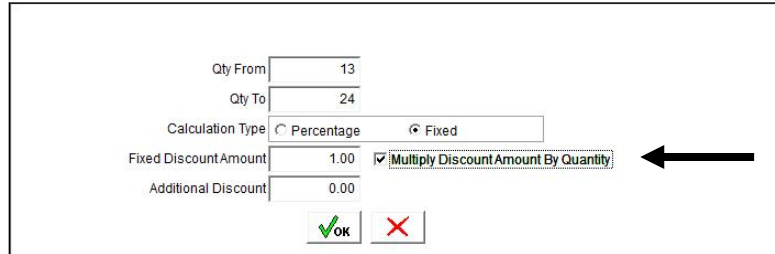
Qty To

Calculation Type  Percentage  Fixed

Fixed Discount Amount  ←  Multiply Discount Amount By Quantity

Additional Discount

18. If you would like the discount to be applied to all the items that qualify for a discount, select the option 'Multiply Discount Amount by Quantity' — this will result in the 1.00 discount being applied to each item individually.

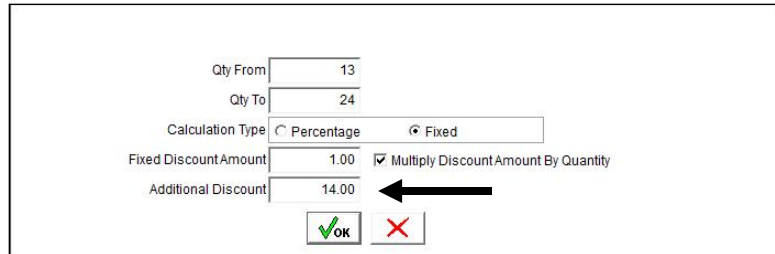


The screenshot shows a form with the following fields and values:

Qty From	13
Qty To	24
Calculation Type	<input type="radio"/> Percentage <input checked="" type="radio"/> Fixed
Fixed Discount Amount	1.00
Additional Discount	0.00

At the bottom, there are two buttons: a green checkmark button labeled 'OK' and a red 'X' button. A black arrow points to the checkbox labeled 'Multiply Discount Amount By Quantity', which is checked.

19. The *Additional Discount* option allows you to enter a fixed additional discount to the promotion. In this case, a rental credit is included for '14.00':



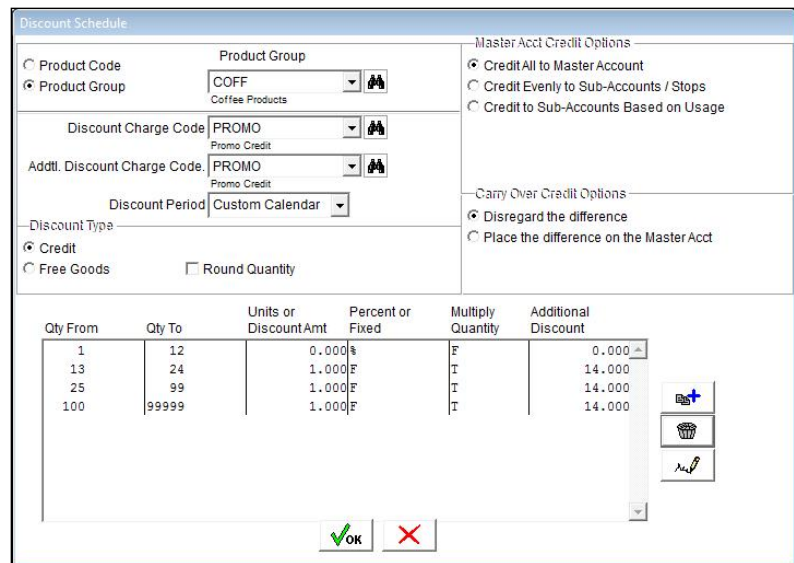
The screenshot shows a form with the following fields and values:

Qty From	13
Qty To	24
Calculation Type	<input type="radio"/> Percentage <input checked="" type="radio"/> Fixed
Fixed Discount Amount	1.00
Additional Discount	14.00

At the bottom, there are two buttons: a green checkmark button labeled 'OK' and a red 'X' button. A black arrow points to the 'Additional Discount' field, which contains the value '14.00'. The checkbox 'Multiply Discount Amount By Quantity' is also checked.

20. Click **OK** to save the new rule. Repeat these steps until each tier of the promotion has been added.

Here is an example of the completed promotion:



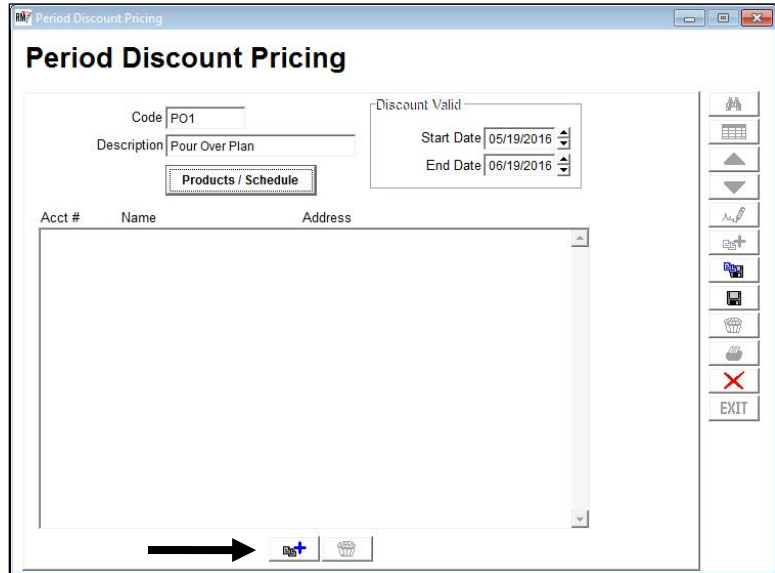
Qty From	Qty To	Units or Discount Amt	Percent or Fixed	Multiply Quantity	Additional Discount
1	12	0.000	F	F	0.000
13	24	1.000	F	T	14.000
25	99	1.000	F	T	14.000
100	99999	1.000	F	T	14.000

In summary, customers assigned to this promotion will qualify for the following discounts when they purchase the preset number of items in the assigned product group, within the allotted period:

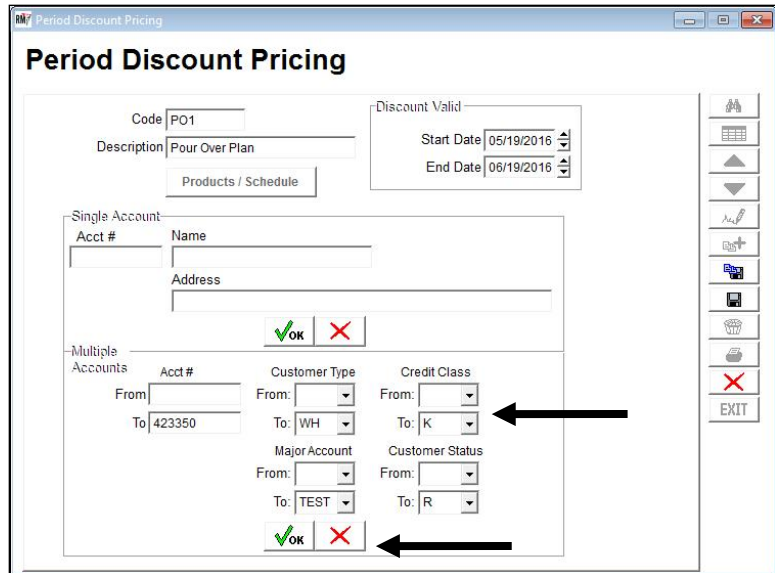
- ▶ **1-12 items purchased:** Standard price, no discounts earned.
- ▶ **13-24 items purchased:** '1.00' dollar discount earned on each item, with an additional '14.00' credit earned for rent.
- ▶ **25-99 items purchased:** '2.00' dollar discount earned on each item, with an additional '14.00' credit earned for rent.
- ▶ **100-99999 items purchased:** '2.45' dollar discount earned on each item, with an additional '14.00' credit earned for rent.

Click **OK** twice to return to the *Period Discount Pricing* screen.

- To add customers to the promotion, choose the **Add** key on the bottom of the screen.

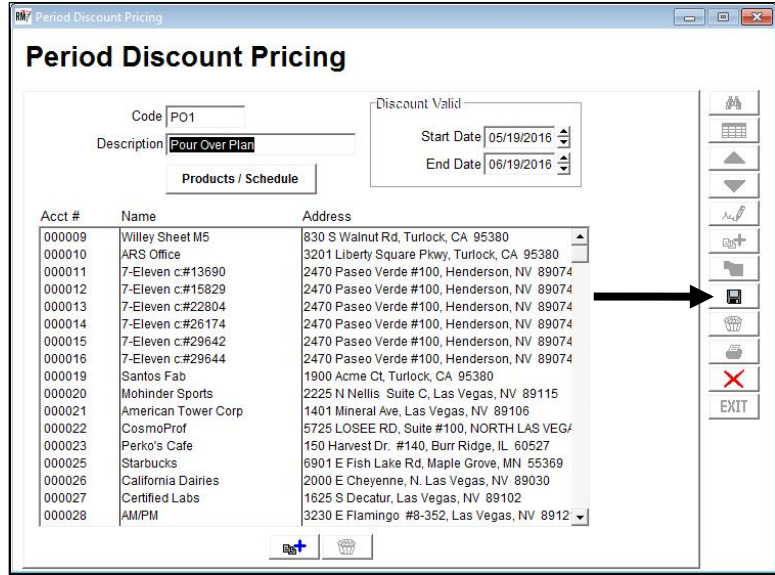


- Enter an account number or specify the account criteria in the *Multiple Accounts* field to assign the promotion to your customers, and click **OK**.



**NOTE:** In this example, all *Customer Types* will be assigned to the promotion. Alternatively, customers can be assigned a *Period Discount Pricing Code* within their account under *Lists > Customer Information > Credit*, on the *Billing/Statement* screen.

23. Click **Save** or **More** to complete the process.



This completes the setup process for a discount promotion using the custom calendar. Continue to the next section to learn the daily process for *Period Discount Pricing*.



## Daily Processing – Desktop

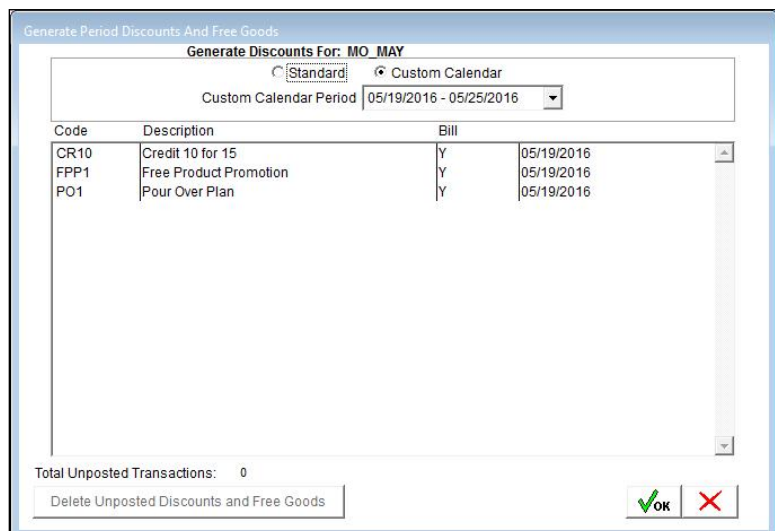
Managing *Period Discount Pricing* will take place during the end of month process unless you are using the custom *Period Discount Pricing Calendar* (discussed earlier within this document). Refer to the section that applies to your company.

**NOTE:** Technical Note: The Invoices created for the “Discounts” will be found in the rmdginvtmp/d tables with an invoice key that starts with “PD\_C\_”. The Invoices created for the Free Products, will be stored in the rmdginvfreeproducts table with an inv\_key that starts with “PD\_F\_”.

### Standard Schedule (Monthly, Quarterly, Yearly)

Managing *Period Discount Pricing* on the desktop takes place during the end of month process. The following steps will be added to your normal *Period Close* routine.

1. Navigate to *Transactions > Generate Discounts and Free Goods*.
2. Click **OK** to generate credits or free goods on accounts assigned to the displayed promotions.



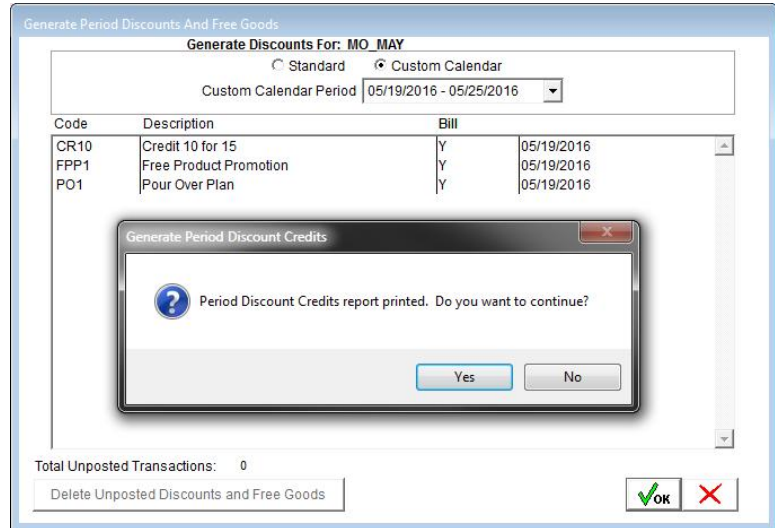
Code	Description	Bill	
CR10	Credit 10 for 15	Y	05/19/2016
FPP1	Free Product Promotion	Y	05/19/2016
PO1	Pour Over Plan	Y	05/19/2016

**NOTE:** To ignore any displayed promotion, simply click on it to toggle the *Bill* option from ‘Y’ to ‘N’.

3. If credits or free goods are due, Route Manager will automatically generate a detailed discount report.

Period Discount Credit/Free Product						
Acct.	Stop	Name	Plan	Description	Credit	Free Product
000010	01	Advantage Route Systems, Inc.	CR10	Credit 10 for 15	-4.36	
000010	01	Advantage Route Systems, Inc.	FPP1	Free Product Promotion		1.00
<b>Totals</b>					-4.36	1.00

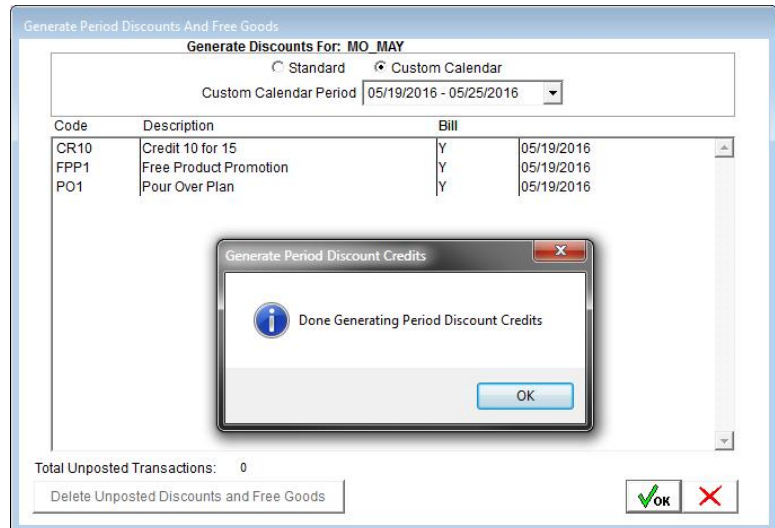
- Once you have printed or closed the report screen, choose 'Yes' to generate credits or free goods, or 'No' to cancel.



The screenshot shows the 'Generate Period Discounts And Free Goods' window. The 'Generate Discounts For:' is set to 'MO\_MAY'. The 'Custom Calendar Period' is '05/19/2016 - 05/25/2016'. A table lists items with columns for Code, Description, Bill, and a date. A dialog box titled 'Generate Period Discount Credits' is overlaid, asking 'Period Discount Credits report printed. Do you want to continue?' with 'Yes' and 'No' buttons.

Code	Description	Bill	
CR10	Credit 10 for 15	Y	05/19/2016
FPP1	Free Product Promotion	Y	05/19/2016
PO1	Pour Over Plan	Y	05/19/2016

- Click **OK** to the confirmation message.



The screenshot shows the same 'Generate Period Discounts And Free Goods' window. The dialog box now displays an information icon and the text 'Done Generating Period Discount Credits' with an 'OK' button.

Code	Description	Bill	
CR10	Credit 10 for 15	Y	05/19/2016
FPP1	Free Product Promotion	Y	05/19/2016
PO1	Pour Over Plan	Y	05/19/2016

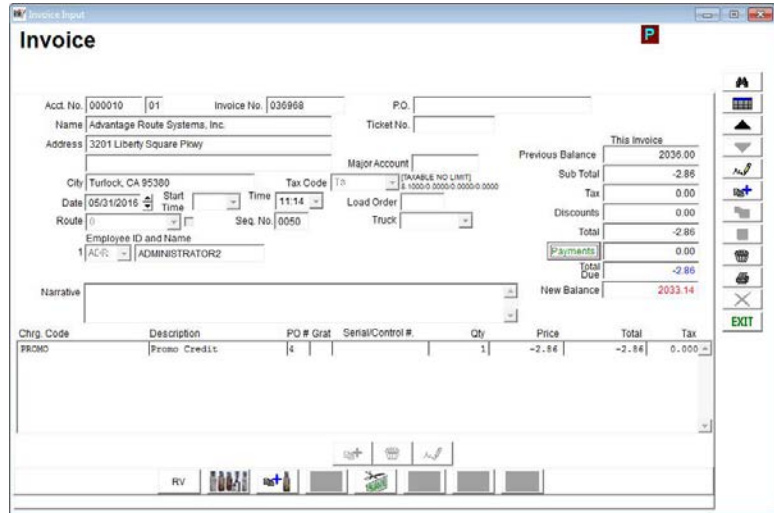
- Choose **Exit** to close the *Generate Discounts and Free Goods* screen.

To apply credits or free goods to each account, the transactions generated will need to be posted to complete the process.

Examples of generated discounts are included below:

**Discount Invoice Example**

The following invoice reflects a 10% discount credit generated on an account that purchased '60' bottles of water (at about '0.48' each) during the current promotion period:



The screenshot shows an 'Invoice Input' window with the following details:

- Acct. No: 000010 | 01 Invoice No: 035968 P.O.:
- Name: Advantage Route Systems, Inc. Ticket No.:
- Address: 3201 Liberty Square Plow
- City: Turlock, CA 95300 Tax Code: T (TAXABLE NO LIMIT)
- Date: 05/31/2016 Start Time: 11:14 Time: 11:14
- Route: 0 Seq. No: 0050 Load Order: Truck:
- Employee ID and Name: 1 AC: ADMINISTRATOR2

Summary Table:

	Previous Balance	This Invoice
Sub Total	2036.00	-2.86
Tax	0.00	0.00
Discounts	0.00	0.00
Total	-2.86	0.00
Payments	0.00	-2.86
Total Due	-2.86	2033.14
New Balance		2033.14

Table with 7 columns: Chrg. Code, Description, PO #, Grnt, Serial/Control #, Qty, Price, Total, Tax

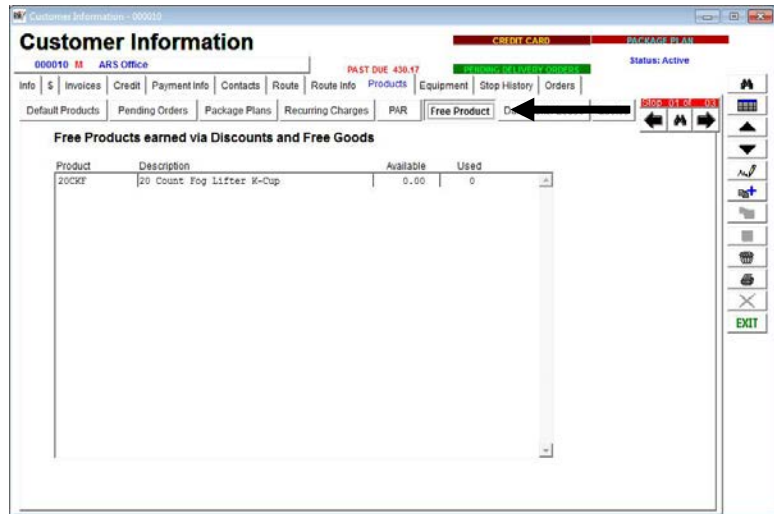
Chrg. Code	Description	PO #	Grnt	Serial/Control #	Qty	Price	Total	Tax
PROMO	Promo Credit	4			1	-2.86	-2.86	0.000

### Free Goods Example

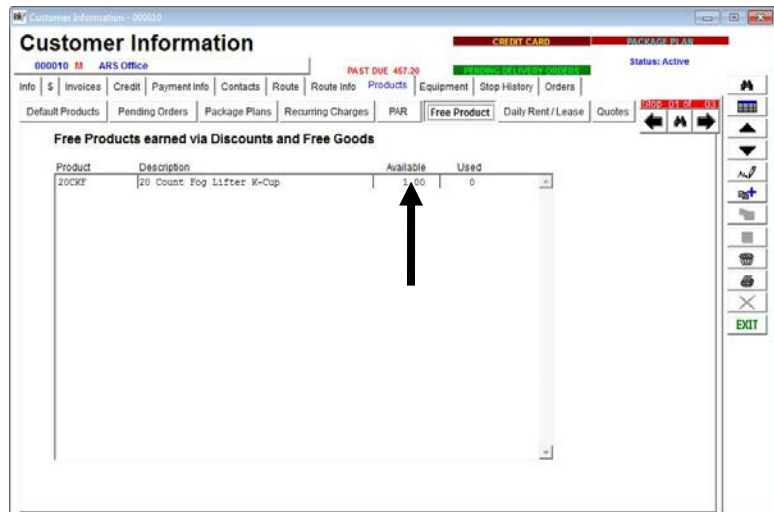
When generating “free goods” discounts, the invoices created cannot be viewed within the *Invoices and Adjustments* screen. These types of transactions cannot be modified in the system, but will need to be posted to complete the discount credit process.

**NOTE:** The free goods transactions generated will be listed within the *Post Transactions* screen. Additionally, they can be deleted within the *Generate Discounts and Free Goods* screen prior to posting, if necessary.

Once the transactions have been posted, the free goods credits can be viewed within *Lists > Customer Information > Products*, then by selecting the *Free Product* button on the screen.



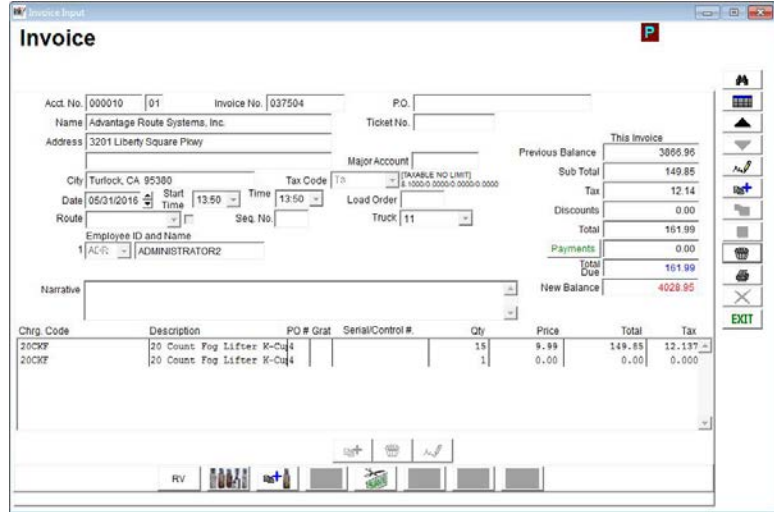
The following example reflects a free bottle that was credited on the account for purchasing ‘15’ bottles during the current promotion period:



Any free goods credits will automatically be credited on invoice entry during the customer's next transaction on the desktop or handheld.

### Desktop Invoice

The following desktop invoice reflects that the customer is purchasing 15 K-Cup boxes, and automatically receives an additional box free of charge:



**Invoice**

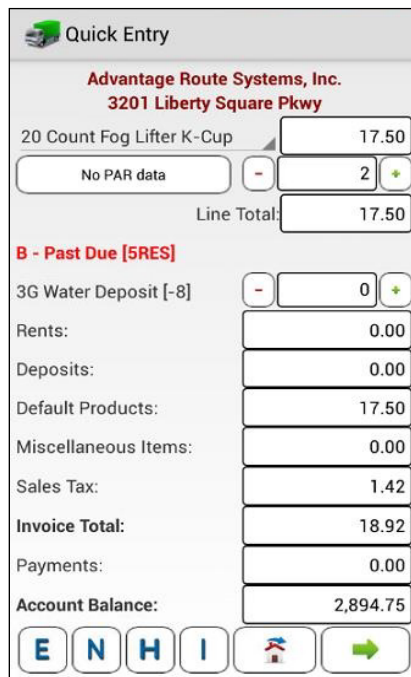
Acct. No. 000010 01 Invoice No. 037504 PO. \_\_\_\_\_  
 Name Advantage Route Systems, Inc. Ticket No. \_\_\_\_\_  
 Address 3201 Liberty Square Pkwy Major Account \_\_\_\_\_  
 City Turlock, CA 95380 Tax Code \_\_\_\_\_ (AVAILABLE NO LIMIT)  
 Date 05/31/2016 Start Time 13:50 Time 13:50 Load Order \_\_\_\_\_  
 Route \_\_\_\_\_ Seq. No. \_\_\_\_\_ Truck 11  
 Employee ID and Name  
 1 ACR: ADMINISTRATOR2

Previous Balance		This Invoice	
Sub Total	3866.95	Sub Total	149.85
Tax	12.14	Tax	12.14
Discounts	0.00	Discounts	0.00
Total	161.99	Total	161.99
Payments	0.00	Payments	0.00
Total Due	161.99	Total Due	161.99
New Balance	4028.95	New Balance	4028.95

Chrg. Code	Description	PO #	Grat	Serial/Control #	Qty	Price	Total	Tax
20CKP	20 Count Fog Lifter K-Cup4				15	9.99	149.85	12.137
20CKP	20 Count Fog Lifter K-Cup4				1	0.00	0.00	0.000

### Handheld Invoice

The following handheld transaction reflects that the customer is purchasing two bottles, and automatically receives one bottle free of charge:



**Quick Entry**

**Advantage Route Systems, Inc.**  
**3201 Liberty Square Pkwy**

20 Count Fog Lifter K-Cup

No PAR data

Line Total:

**B - Past Due [5RES]**

3G Water Deposit [-8]

Rents:

Deposits:

Default Products:



Miscellaneous Items:

Sales Tax:

**Invoice Total:**

Payments:

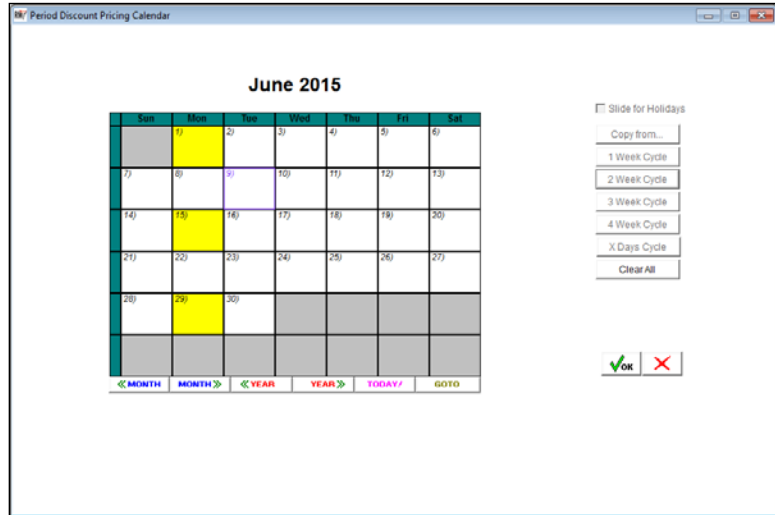
**Account Balance:**

**E N H I**  



## Custom Schedule (Period Discount Pricing Calendar)

Managing *Period Discount Pricing* will depend on the discount cycle established within your *Period Discount Pricing Calendar*. In this example, a bi-weekly calendar has been established:



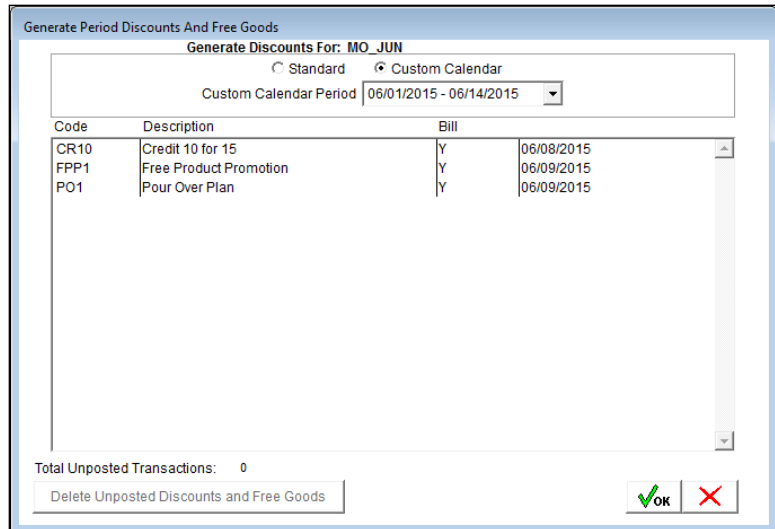

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**NOTE:** Generating discounts should take place on, or around the end of each cycle (i.e., the 14<sup>th</sup> and 28<sup>th</sup> on the calendar above).

---

To generate discounts on your accounts, follow the steps below:

1. Navigate to *Transactions > Generate Discounts and Free Goods*.



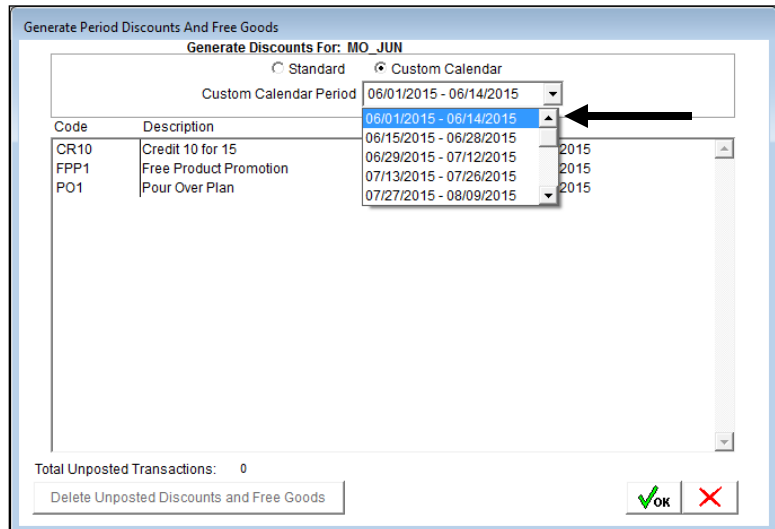
Code	Description	Bill	
CR10	Credit 10 for 15	Y	06/08/2015
FPP1	Free Product Promotion	Y	06/09/2015
PO1	Pour Over Plan	Y	06/09/2015

Total Unposted Transactions: 0

Delete Unposted Discounts and Free Goods

OK X

2. Select the 'Custom Calendar Period' that you would like to generate discounts for from the drop-down list:



Code	Description	Bill	
CR10	Credit 10 for 15	Y	2015
FPP1	Free Product Promotion	Y	2015
PO1	Pour Over Plan	Y	2015

Total Unposted Transactions: 0

Delete Unposted Discounts and Free Goods

OK X

**NOTE:** The *Custom Calendar* view will automatically be displayed if the system detects an established *Period Discount Pricing Calendar* in RMA.



- Click **OK** to generate the qualified discount transactions:

Generate Period Discounts And Free Goods

Generate Discounts For: **MO\_JUN**

Standard 
  Custom Calendar

Custom Calendar Period: 06/01/2015 - 06/14/2015

Code	Description	Bill	
CR10	Credit 10 for 15	Y	06/08/2015
FPP1	Free Product Promotion	Y	06/09/2015
PO1	Pour Over Plan	Y	06/09/2015

Total Unposted Transactions: 0

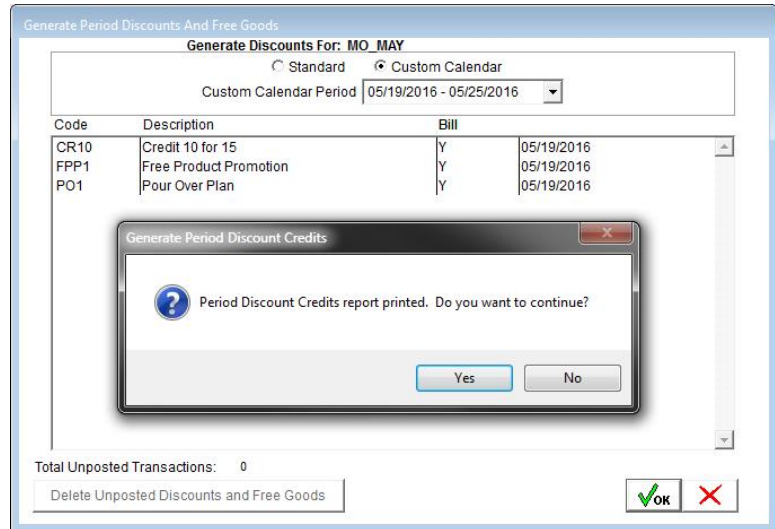
Delete Unposted Discounts and Free Goods

**NOTE:** To ignore any displayed promotion, simply click on it to toggle the *Bill* option from 'Y' to 'N'.

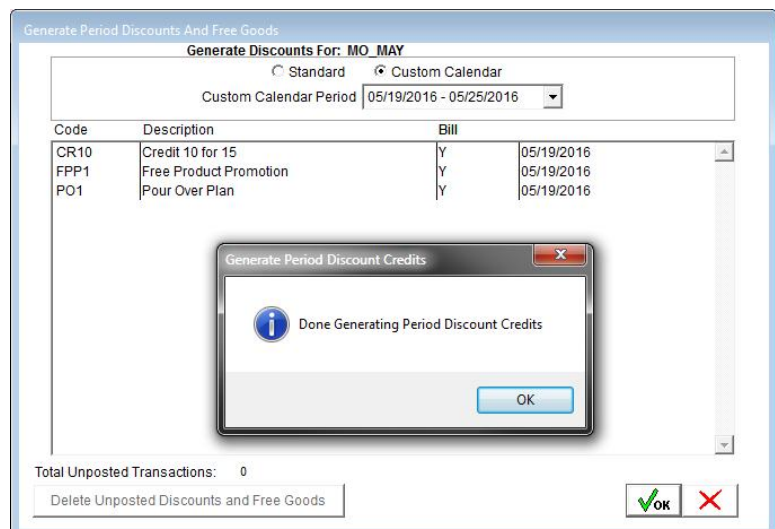
- If credits or free goods are due, Route Manager will automatically generate a detailed discount report.

Period Discount Credit/Free Product						
Acct.	Stop	Name	Plan	Description	Credit	Free Product
00100	01	Easy Mart 2	PO1	Pour Over Plan	-28.00	
00103	01	Andy's County Corner	PO1	Pour Over Plan	-74.00	
00104	01	Corner Stop	PO1	Pour Over Plan	-261.45	
<b>Totals</b>					<b>-363.45</b>	<b>0.00</b>

- Once you have printed or closed the report screen, choose 'Yes' to generate credits or free goods, or 'No' to cancel.



- Click **OK** to the confirmation message.



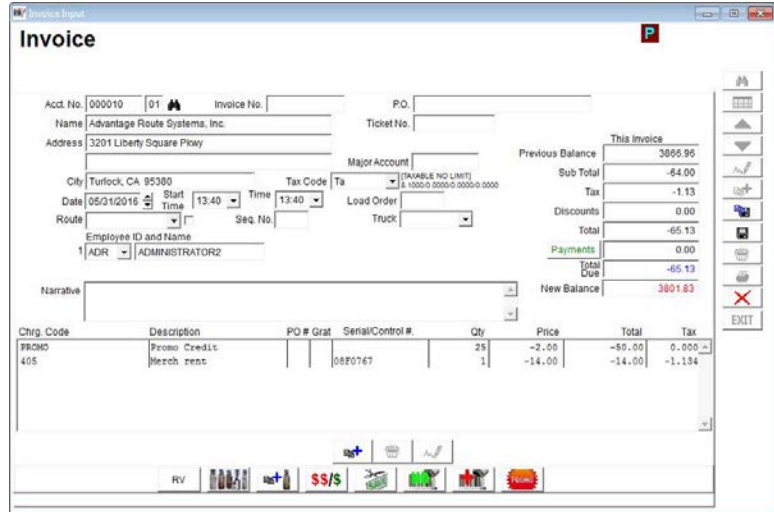
- Choose **Exit** to close the *Generate Discounts and Free Goods* screen.

To apply the credits to each account, the transactions generated will need to be posted to complete the process.

An example of a generated discount is included below:

***Discount Invoice Example (with Additional Discount)***

The following invoice reflects a fixed one-dollar discount on '15' items purchased within the same item group, with an additional '14.00' rental discount applied:



**Invoice**

Acct. No: 000010 01 Invoice No. P.O.  
 Name: Advantage Route Systems, Inc. Ticket No.  
 Address: 3201 Liberty Square Plow  
 City: Turlock, CA 95380 Tax Code: Tax (TAXABLE NO LIMIT) \$ 1000-0 0000-0 0000  
 Date: 05/31/2016 Start Time: 13:40 Time: 13:40 Load Order: Truck  
 Route: Employee ID and Name: 1 ADR ADMINISTRATOR2

Previous Balance		This Invoice	
Sub Total	3855.95	Sub Total	-64.00
Tax	-1.13	Tax	-1.13
Discounts	0.00	Discounts	0.00
Total	-65.13	Total	-65.13
Payments	0.00	Payments	0.00
Total Due	-65.13	Total Due	-65.13
New Balance	3801.83	New Balance	3801.83

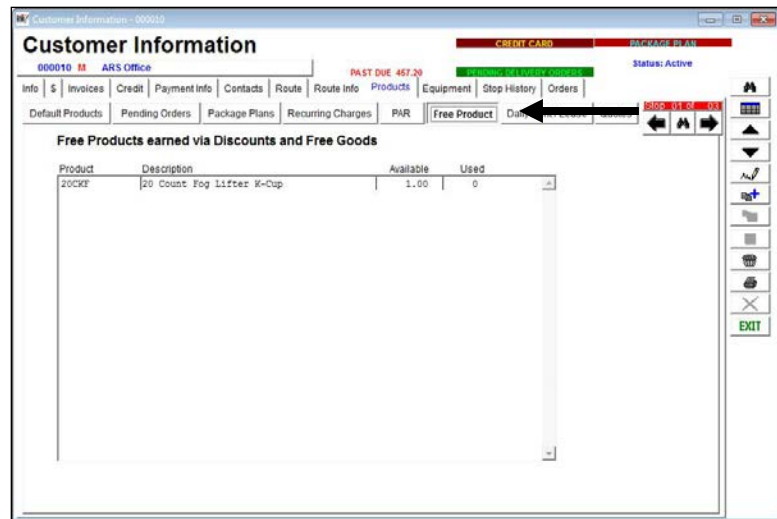
Chrg. Code	Description	PO #	Grat	Serial/Control #	Qty	Price	Total	Tax
PROMO	Promo Credit				25	-2.00	-50.00	0.000
405	Merch rent			08F0767	1	-14.00	-14.00	-1.134

## Available Quantity

An additional button has been added to the *Customer Information* screen to reference the number of free products available, and used, on each account.

**NOTE:** This option does not apply to the 'discount' type plans discussed earlier.

To view a customer's *Period Discount* product details, navigate to *Lists > Customer Information*, and select the *Products* tab. Click on the 'FREE' button on the screen to view the available product information.



Based on the information displayed above, the current customer qualifies for five free '5 Gallon Spring' water (Available), and they have received no bottles that were applied to their account in the past (Used).

## Reports

The *Free Product Report* includes detailed free product information generated when using the *Period Discount Pricing* option, and can be found under *Reports > Management Reports*.

**NOTE:** This option does not apply to the 'discount' type plans discussed earlier.

Free Product Report

**Free Product Report**

Sort Option 1  
by Acct. No.

Date	Acct. No.	Major Acct. Code
From 06/01/2015	From	From
To 06/30/2015	To 999999	To ARS

Change Branch(s)

Apple, Close, Print, Help, FAX, Mail, Print

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