CStoreOffice®

Promotions Manual

For Petrosoft Users

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PROMOTIONS

About Promotions

With the Promotions tool, special discounts and enticements or promotions can be set for customers. This will also help drive traffic and sales. CStoreOffice® supports various promotion types from simple price reductions for a specific period of time to more advanced offers based either on the sale of specific quantities or a combination of items in a transaction. The time span for the promotion and locations where it will be in effect can be defined.

Promotions can be applied to specific Price Book items; however, it is usually more efficient to use Promo Groups made up of items that satisfy the requirements of the promotion or combine both the Promo Groups and items in the single promotion. The Promotions tool and Promotions Groups tool can be used in conjunction—to define the circumstances under which the buyer is offered the promotion and to select the items to be included in it.

Workflow Overview

Following are the steps for setting up a promotion in CStoreOffice® PIM:

1. This is optional - Create a Promo Group, or make sure there is one that satisfies current needs. For more information on Promo Groups, see Promo Groups.

   > 💡 If a combo is going to be created, skip this step.

2. Add a promotion. For more information, see Adding New Promotion.

3. Review and verify the promotion and send it to cash registers.

When the promotion is created, it can be viewed, edited, continued, and ended. For more information on how to work with promotions, see Working with Promotions.

Promo Groups

Promo Groups allow the user to include a number of items in a given marketing promotion.

> ℹ️   Only users with appropriate permissions can create, edit, and delete the promo groups.

HOW TO ACCESS PROMO GROUPS LIST

To open the list of promo groups, go to **Price Book** > **Promo Groups**.

> ℹ️   All new (created within the last seven days) promo groups are marked with the green asterisk.

HOW TO ADD OR EDIT PROMO GROUPS

To open the form for editing a promo group, click **Add New** or select a group in the list and click **Edit**.

Items in the **Promo Groups** form include:

- **Promo Group ID**: The promo group number
- **Promo Group Name**: The name of the promo group
- **Custom Category**: The category to which the items of this group belong
- **CR Department**: The cash register department to which the items in this group belong

> 💡   Promo Groups can be combined with the regular items to create the Price Each Mix promotions.

The Related Information section includes:

- **Promo Groups List**: Displays a report with a list of the groups
- **Promo Group Items**: Displays a list of the items included in the selected promo group

HOW TO PRINT PROMO GROUPS LIST

To view the list of promo groups in the printer friendly view, open the promo groups list and click the **Print** button at the top of the list.

CStoreOffice® loads the list of promo groups to a file of the PDF format and saves this file to the default downloads folder on the computer. To open the file, locate the downloaded file on the computer and double-click it.

List of Promo Groups
Greyhound

CSTORE OFFICE
www.cstoreoffice.com

PROMO GROUP #	NAME	ITEMS QTY
1	B&H	1
2	BASIC	24
3	CAMEL 99	5
4	CAMEL CORE	6
5	CAPRI	90
6	CIMARRON	2
7	DORAL	3
8	L&M	10
9	GPC	14
10	Pall Mall .50c off	9
11	KENT	1
12	KOOL	11
14	Marlboro Mainline	21
15	MAVERICK	13
16	MERIT	4
17	MISTY	6
18	Camel Turkish Blnd	6
19	NEWPORT	15
20	PALL MALL	14
21	PARLAMENT	9
22	SALEM	16
23	USA	14
24	MARL .50 OFF PK	0
26	VIRG	16
27	WINSTON	18
28	B&H-CART	1

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Promotion Types

With Petrosoft products, you may configure and offer to your customers a wide range of promotions.

All promotions are configured via the CStoreOffice® interface and available within the CStoreOffice® subscription. Whereas for certain promotion types, you need to purchase additional Petrosoft products.

CStoreOffice® promotions are described below and divided into the following two groups:

- Regular promotions
- Combo promotions

Additionally, you may purchase the following Petrosoft products to benefit from corresponding promotions:

Scan Data Product

Promotion Type	Reference Materials
- Outlet Multi Pack	
- Account Funded	• About Scan Data
- Manufacturer Multi Pack	• How to configure Scan Data promotions
- Manufacturer Buy-Downs	

Scan Data Loyalty Product

Promotion Type	Reference Materials
- Buy X, Get $ Off Instantly	• About Scan Data Loyalty • How to configure Scan Data Loyalty promotion

Go Loyalty Product

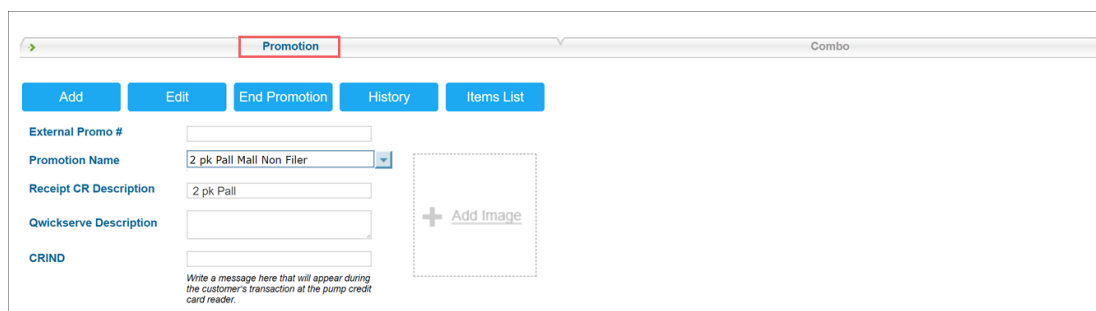| Promotion Type	Reference Materials
- Buy X, Get Fuel Discount Instantly	
- Buy X, Get Y Free Instantly	
- Buy X in Period, Get Y Free	
- Earn Points Merchandise and/or Fuel	• About Go Loyalty
- Get Permanent Fuel Discount	• Configuring Go Loyalty Promotions
- Spend $, Get Fuel Discount Instantly	
- Spend $ in Period, Get Fuel Discount Next Period	
- Spend $ in Period, Get Fuel Discount Next Transaction	

Regular Promotions

Regular promotions allow the defining of a discount on specific items or groups of related items. CStoreOffice® offers the following types of regular promotions:

- **Coupon**: A discount on specific items that is activated if a customer shows a coupon at the cash register.
- **Happy Hours**: A specified discount on items depending on certain days and hours.
- **Link Saver**: A discount that is applied to items from promo groups in case these items are purchased together with items from the primary (or trigger) promo group.
- **Mix & Match**: A discount for buying a combination of items in a single purchase, for example, a cup of coffee and donut.
- **New Price**: A new price is specified and applied to specific items at a certain period of time.
- **Price Each Mix**: A discount for buying at least one item from two or more groups of promoted items.
- **Price Modifier**: A new price for buying two or more items of the same type, rather than buying one item.
- **Price Reduction**: A money discount that will be specified and applied to specific items at a certain period of time.

Regular promotions can be managed using the **Promotion** form in CStoreOffice®. For more details, see Promotion Setup Form.

Combo Promotions

A combo is a special type of promotion that includes from two to five items with a specific predefined price for each item. Combo promotions can be managed using the **Combo** form in CStoreOffice®. For more details, see Combo Setup Form.

Promotion	>	Combo

Save **Close** **Delete**

External Promo #

Combo Name Combo Promotion

Combo Receipt CR Description Combo Promotion

CRIND

Write a message here that will appear during the customer's transaction at the pump credit card reader.

Product Code

Soft Key Number 0

* for Ruby & Sapphire registers

Coupon Promotion

The Coupon promotion gives customers a discount when they show coupons at the cash register.

When setting up a Coupon promotion, the types of coupons that are going to be used can be selected:

- Predefined: For this coupon type, the type and amount of the discount are pre-configured in the back office system beforehand. When a coupon is activated at the cash register, the specified discount type and amount are applied to the promoted items in the cart.
- Promoted: For this coupon type, the type of the discount is pre-configured in the back office system beforehand. The discount amount, however, is not specified. When a coupon is activated at the cash register, the cashier enters the discount amount manually.

Depending on the coupon type, Coupon promotions can be set to offer the following discount types:

- Predefined coupon promotion:
  - o Amount: reduces the item price by the predefined amount
  - o Percent: reduces the item price by the predefined percent rate
  - o New Price: replaces the current item price with the predefined price value
- Prompted coupon promotion:
  - o Prompted amount: reduces the item price by the amount value entered by a cashier
  - o Prompted percent: reduces the item price by the percent rate entered by a cashier
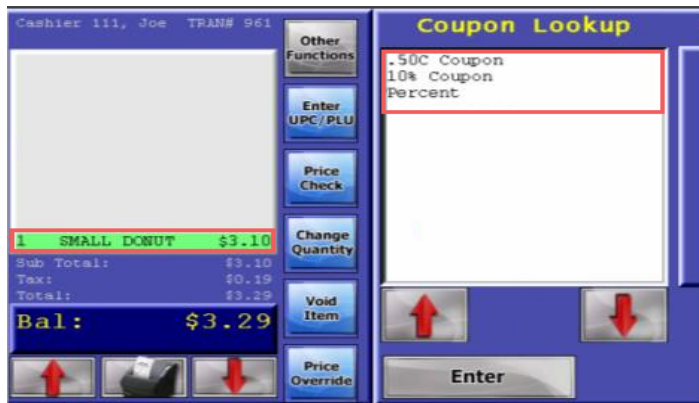 - o Prompted new price: replaces the current item price with the price value entered by a cashier

ⓘ For more information on cash register limitations, see Compatible Cash Registers.

How Coupon Promotion Works

A typical workflow for the Coupon promotion is the following:

1. When the cashier scans items in the shopping cart, available coupon promotions are displayed on the cash register for each item.
2. A customer shows his or her coupons to the cashier.
3. The cashier verifies the presented coupons and then selects corresponding coupon promotions

on the cash register to apply them to the items.

Setting Up Coupon Promotions

To set up a Coupon promotion:

1. Go to **Price Book** > **Promotions**.

2. At the top of the **Promotions** form, click **Add New**.

3. In the **Promotion Name** field, enter the name for the new promotion.

4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.

5. In the **Promotion Type** list, select **Coupon**.
   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.

6. In the **How much** section:

   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.

   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.

7. In the **What is included?** section, select the desired additions to be included in the promotion. You can add items and promo groups. For more details, see Promotion Setup Form.
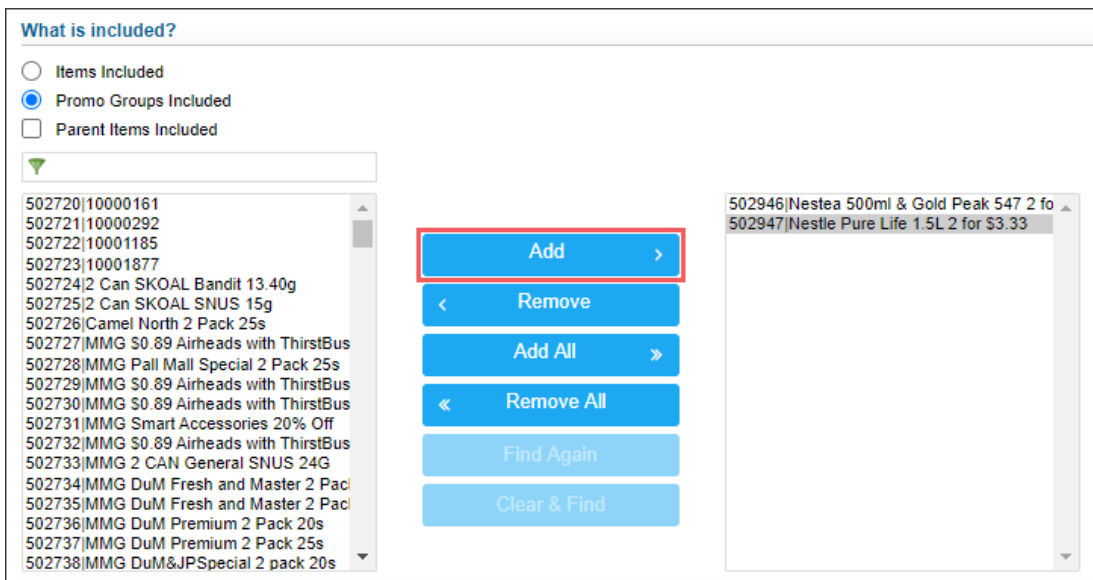
8. In the **How much?** section, configure the following promotion's basic parameters:

   a. In the **Coupon type** field, select **Predefined** or **Prompted**.

   b. In the **Discount type** list, select the type of discount that you want to set for the promotion:

      ● **New price**: Select this option if a new price for the promoted items is to be set.

      ● **Amount**: Select this option if a discount as the exact amount is to be specified.

      ● **Percent**: Select this option if a discount as the percent rate is to be specified.

   c. In the **New price** or **Price reduction** field below, specify the new price for promoted items or the discount value, depending on the discount type that has been selected.

   > ⓘ The New price or Price reduction field is mandatory for the Coupon promotion.

   d. In the **Promotion unit cost** field, specify the item cost for the promotion.

   e. In the **Taxation** list, select when the taxes must be calculated for items added to the promotion: **After discount** or **Before discount**.

9. Configure the following promotion's settings:

   o **Reimbursement from Vendor**

   o **Timeframe**: Only days can be configured for this promotion type without hours.

   > ⓘ The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.

10. Scroll down to the **Promo Results** table and make sure that the promotion is set up correctly. The promo results are calculated by the following formulas:

- o Retail:
  - New Price: *Retail = Promo Price*
  - Amount: *Retail = Current Retail - Amount Discount*
  - Percent discount: *Retail = Current Retail - ((Current Retail / 100) * Discount Percent)*

- o Price Change:
  - New Price: *Price Change = (Promo Price - Current Retail) + Buydowns*
  - Amount: *Price Change = -(Amount Discount) + Buydowns*
  - Percent discount: Price Change = - *(Percent Discount*Current Retail/100) + Buydowns*

For example, you set up a promotion in the following way:

- o The initial retail price for the promoted item is $1.19.
- o The promotion price is $1.00.
- o The reimbursement amount is $0.19.

In this case, in the **Promo Results** section, you will see the following values:

- o Retail: $1.00
- o Price Change: $1.00 - $1.19 + $0.19 = $0.00

☐ Promo Result					
Station Name	Retail	QTY	Price Change	Buydown	
Cochran	$1.00	1	$0.00	$0.19	Explanation

> ☐ To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

11. At the top of the promotion form, click **Save** to save the changes.

Happy Hours Promotion

The Happy Hours promotion gives customers a discount on certain items on specific weekdays and at specific times during the day. Promotions of this type help drive sales in not too busy parts of the week or day. For example, a Happy Hours promotion can be set up to provide a 20% discount on items in the menu between 11.00 AM and 2.00 PM Monday through Friday.

The Happy Hours promotion is actually a variation of the existing promotion types and is set up with the help of these promotions. However, while most promotions give a 'permanent' discount that is in effect for the whole duration of the promotion, the Happy Hours promotion allows you to define the 'schedule' when the discount must be active.

> (i) For more information on cash register limitations, see Compatible Cash Registers.

How Happy Hours Promotion Works

A store has lentil soup on the menu which has a regular price of $6.00. A Happy Hours promotion can be created and its settings defined in the following way:

- Promotion type - Price reduction
- Price reduction value - $2.00
- Promotion schedule - 11:00 AM-04:00 PM Monday through Friday

In this case, if a customer orders the lentil soup on Saturday at 11:00 AM, its cost will be $6.00. If a customer orders the lentil soup on Monday at 12.00 PM, its price will be $4.00.

Setting Up Happy Hours Promotion

To set up a Happy Hours promotion:

1. Go to **Price Book** > **Promotions**.

2. At the top of the **Promotions** form, click **Add New**.

3. In the **Promotion Name** field, enter the name for the new promotion.

4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.

5. In the **Promotion Type** list, select the promotion type that may be configured as the Happy Hours promotion.

> ⓘ For more information on what promotion and CR types support for the Happy Hours parameter, see Compatible Cash Registers.

Result: The promotion default settings are uploaded in the **How much?** section according to the

selected promotion type.

6. In the **How much** section:

   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.

   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.

7. In the **What is included** section, select what you want to add to the promotion. You can add items

and promo groups. For details, see Promotion Setup Form.

8. In the **How much** section, specify the promotion parameters depending on the selected promotion type.

9. Configure the following promotion's settings:

   o **Reimbursement from Vendor**

   o **Timeframe**

   The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.

10. Scroll down to the **Promo Results** table and make sure that the promotion is set up correctly. The promo results depend on the type of promotion that was selected. For details, see Promotion Types.

11. At the top of the promotion form, click **Save** to save the changes.

Link Saver Promotion

The Link Saver promotion is a variation of the Price Each Mix promotion. The Link Saver promotion includes two or more groups of promoted items:

- Primary, or trigger group: Items in this group are sold at their regular price.
- Linked promo group: Items in this group are sold with a discount if they are bought together with the items from the trigger group.

A typical example of the Linked Saver promotion is the following: 'Buy two burgers and get a fountain drink at a 20% discount'.

For items in the trigger group, the discount is not specified since these items are sold at their regular price. For items in the linked promo group, the Link Saver promotion supports the following types of discounts:

- New price: A new price for promoted items can be specified.
- Discount amount: A discount as the exact amount can be specified.
- Discount rate in percent: A discount as the percent rate can be specified.

> (i) For more information on cash register limitations, see Compatible Cash Registers.

Setting Up Link Saver Promotions

To set up a Link Saver promotion:

1. Go to **Price Book** > **Promotions**.

2. At the top of the **Promotions** form, click **Add New**.

3. In the **Promotion Name** field, enter the name for the new promotion.

4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.

5. In the **Promotion Type** list, select **Link Saver**.
   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.

6. In the **Priority** list, in case you have several promotions for same group of items, specify the priority in which the promotion will be applied on the cash register in order to be in compliance with the vendor policy. Possible values:

   o **Empty**: Leave the **Priority** field blank, if you have only one promotion for one certain group of items.

   o **From 0 to 10**: Define the promotion's priority by setting up the lowest value to the highest priority level.

> The **Priority** field is supported only by the Radiant cash registers and available. For more information about promotion limitations depending on the CR type, see Compatible Cash Registers.

7. In the **How much** section:
   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.

b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.

8. Configure the promotion's trigger group:

a. In the **What is included?** section, click **Promo Groups Included**.

b. In the left column, select the promo group and click the **Add** button.

   Result: Selected promo group is added to the right column.

c. In the right column, select the promo group and click the **Add List** button.

   Result: The promo group is added to the **How much?** section > promo groups.

d. In the **How much?** section > promo groups:

   a. Double-click added promo group.

   b. (For SmartPOS only) In the **Discount Type** list, select one of the following types of applied discount:

      - **Quantity**: Select this option of you want to specify the number of items a customer must purchase.

      - **Spent Amount**: Select this option of you want to specify the amount of money a customer must purchase.

   c. In the **Quantity** field, depending on the value selected in the Discount Type list, specify one of the following values:

      - If **Quantity** is selected, specify the number of items that a customer must purchase for the promotion to take effect.

      - If **Spent Amount** is selected, specify the amount of money that a customer must purchase for the promotion to take effect.

   > 💡 The Spent Amount option is supported only by the SmartPOS cash register. For more information on cash register limitations, see Compatible Cash Registers.

d. Click the **Update** button.

9. Add the promotion's <u>discount group</u>:

   a. In the **What is included?** section, click **Promo Groups Included**.

   b. In the left column, select the promo group and click the **Add** button.

   Result: Selected promo group is added to the right column.

   c. In the right column, select the promo group and click the **Add List** button.

   Result: The promo group is added to the **How much?** section > promo groups.

   d. In the **How much?** section > promo groups, double-click added promo group and specify the following settings:

   - In the **Quantity** field, specify the number of items that a customer must purchase for the promotion to take effect.

   - In the **Discount type** field, select the type of discount that you want to set for the promotion:

     - **New price**: Select this option if a new price for items in the group is to be set.
     - **Amount**: Select this option if a discount as the exact amount is to be specified.
     - **Percent**: Select this option if a discount as the percent rate is to be specified.

   - In the **Discount** field, specify the new price or the discount value, depending on the discount type that has been selected. This field is mandatory for the Link Saver promotion

e. Click the **Update** button.

10. In the **Promotion unit cost** field, specify the item cost for the promotion.

11. In the **Taxation** list, select when the taxes must be calculated for items added to the promotion: **After discount** or **Before discount**.

12. Configure the following promotion's settings:

   o **Reimbursement from Vendor**

   o **Timeframe**: Only days can be configured for this promotion type without hours.

> ⓘ The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.

13. Scroll down to the **Promo Results** table and make sure that the promotion is set up correctly. The results are calculated for each group separately and then summed up for the **Price Change** values. The promo results are calculated by the following formulas:

   o Retail:

   • New Price: *Retail = Promo Price*

   • Amount: *Retail = Current Retail * QTY - Amount Discount*

   • Percent discount: *Retail = Current Retail - ((Current Retail / 100) * Discount Percent)*QTY*

   o Price Change:

- New Price: *Price Change = Promo Price - (Current Retail * QTY) + Buydowns*
- Amount: *Price Change = -(Amount Discount * QTY) + Buydowns*
- Percent discount: Price Change = *-((Percent Discount*Current Retail/100) * QTY) + Buydowns*

For example, you set up a promotion in the following way:

o The initial retail price for the promoted item is $8.00.

o If a customer buys items from the primary group, the new price for the promoted item is $7.75.

In this case, in the **Promo Results** section, you will see the following values:

o Retail: $7.75

o Price Change: $7.75 - ($8.00 * 1) = (0.25)

> ♡ To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

14. At the top of the promotion form, click **Save** to save the changes.

Mix and Match Promotion

The Mix and Match promotion gives customers a discount when they buy a specific number of items from the predefined list in a single purchase. The promoted items are generally of the same product or product family. For example, the Mix and Match promotion can be used for the following campaigns:

- Buy any three drinks and get a 20% discount.
- Buy 5 candies at $5.00.
- Save $1 off any two packs of cigarettes.

With the Mix and Match promotion type, the following types of discounts can be set:

- New price: A new price for promoted items can be specified.
- Discount amount: A discount as the exact amount can be specified.
- Discount rate in percent: A discount as the percent rate can be specified.

> ⓘ For more information on cash register limitations, see Compatible Cash Registers.

Setting Up Mix and Match Promotions

To set up a Mix and Match promotion:

1. Go to **Price Book** > **Promotions**.

2. At the top of the **Promotions** form, click **Add New**.

3. In the **Promotion Name** field, enter the name for the new promotion.

4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.

5. In the **Promotion Type** list, select **Mix and Match**.
   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.

6. In the **Priority** list, in case you have several promotions for same group of items, specify the priority in which the promotion will be applied on the cash register in order to be in compliance with the vendor policy. Possible values:

   o **Empty**: Leave the **Priority** field blank, if you have only one promotion for one certain group of items.

   o **From 0 to 10**: Define the promotion's priority by setting up the lowest value to the highest priority level.

   > 💡 The **Priority** field is supported only by the Radiant cash registers and available. For more information on cash register limitations, see Compatible Cash Registers.

7. In the **How much** section:

   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.

   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.

8. In the **What is included?** section, select the desired additions to be included in the promotion. You can add items and promo groups. For more details, see Promotion Setup Form.
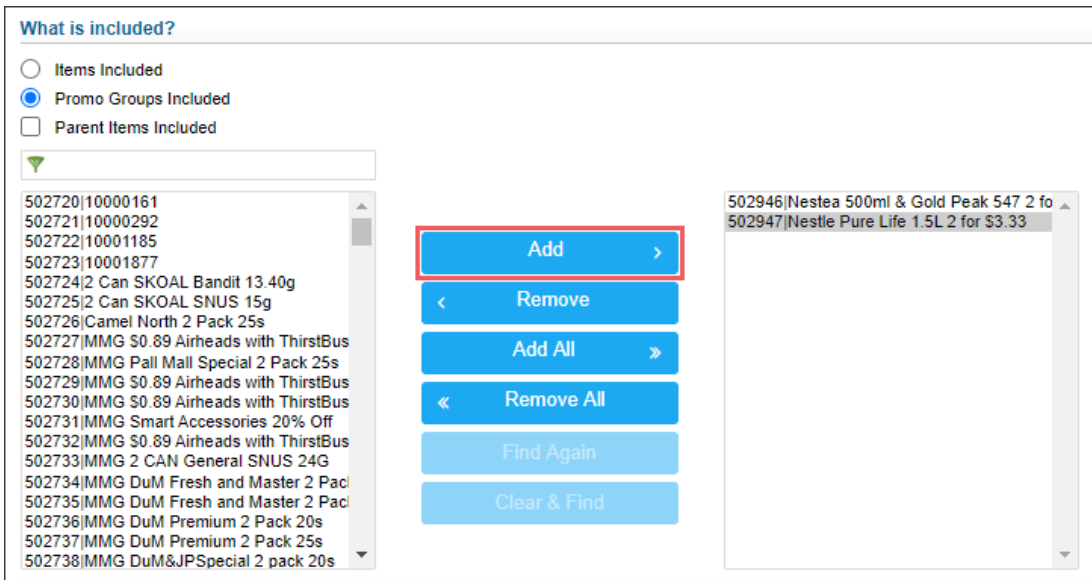
9. In the **How much?** section, configure the following promotion's basic parameters:

   a. In the list on the right of the **Price Change** field, select the type of discount to be set for the promotion:

   - **New Price**: Select this option if a new price for the promoted items is to be set.
   - **Amount**: Select this option if a discount as the exact amount is to be specified.
   - **Percent**: Select this option if a discount as the percent rate is to be specified.

   b. In the **Price Change** field, specify the new price for the promoted items or the discount value, depending on the discount type you have selected. If the **New price** value has been selected, the sum amount for all items for which the promotion is created must be specified. This field is mandatory for the Mix and Match promotion.

   c. In the **Qty Threshold** field, specify the number of items that a customer must purchase for the discount to be applied and enable the and more option if necessary. For example, if the discount is to be applied when a customer purchases two or more items, in the **Qty Threshold** field, specify 2 and enable the **and more** option. This field is mandatory for the Mix and Match promotion.

   d. In the **Promotion Unit Cost** field, specify the item cost for the promotion.

   e. In the **Taxation** list, select when the taxes must be calculated for items added to the promotion: **After discount** or **Before discount**.

> (i) Mind the following:
> - To use the **Before discount** option, make sure the **Allow Tax Before Mix and Match Discount** option is enabled in the CR settings for the location. For details, see Station Options: Cash Register > **Advanced**.
> - (For Sapphire cash registers) If you select the **Before discount** option, make sure the items added to the promotion belong to the same CR department and have the same current retail price. In the opposite case, when you save the promotion settings, CStoreOffice® will report an error, and the promotion will not be saved.

10. Configure the following promotion's settings:

   o **Reimbursement from Vendor**

   o **Timeframe**

> (i) The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.

11. Scroll down to the **Promo Results** table and make sure the promotion is set up correctly. The promo results are calculated by the following formulas:

   o Retail:
   - New Price: *Retail = Promo Price*
   - Amount: *Retail = Current Retail * QTY - Amount Discount*
   - Percent discount: *Retail = Current Retail - ((Current Retail / 100) * Discount Percent) * QTY*

   o Price Change:
   - New Price: *Price Change = Promo Price - (Current Retail * QTY) + Buydowns*
   - Amount: *Price Change = - Amount Discount + Buydowns*
   - Percent discount: Price Change = *-((Percent Discount * Current Retail/100) * QTY) + Buydowns*

For example, you set up a promotion in the following way:

- The initial retail price for the promoted item is $11.33.

- If a customer buys 2 items, the new price for 2 items is $22.00.

- No reimbursement amount is set up.

In this case, in the **Promo Results** section, you will see the following values:

- Retail: $22.00

- Price Change: *$22.00 - ($11.33*2) = (0.66)*

Promo Result							
Station Name	Retail	QTY	Price Change	Buydown	Promo Resource	Station Taken Capacity	
Highland	$22.00	>= 2	($0.66)	$0.00	$0.00	$0.00	Explanation

> ♀ To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

12. At the top of the promotion form, click **Save** to save the changes.

New Price Promotion

New Price promotions will allow a temporary reduction in the price of some items for a certain period of time. This type of promotion can be used to drive the product interest and entice new customers.
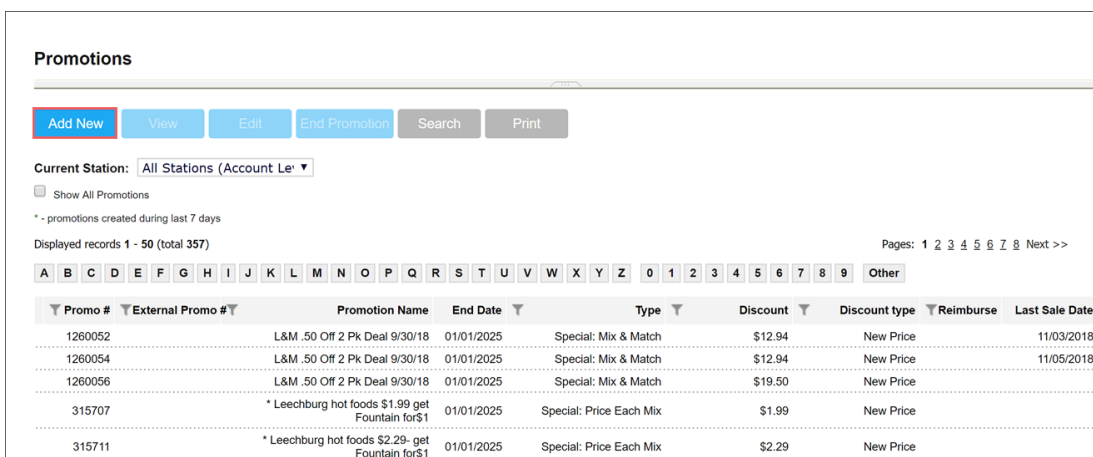
With the Price Reduction Promotion type, only one discount type can be set up — the new price for promoted items. For example, if a regular item price is $5.95, a new price for the item can be set at $.5.25.

> ⓘ For more information on cash register limitations, see Compatible Cash Registers.

Setting Up New Price Promotions

To set up a New Price promotion:

1. Go to **Price Book** > **Promotions**.

2. At the top of the **Promotions** form, click **Add New**.

3. In the **Promotion Name** field, enter the name for the new promotion.

4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.

5. In the **Promotion Type** list, select **New Price**.
   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.

6. In the **How much** section:

   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.

   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.

7. In the **What is included?** section, select the desired additions to be included in the promotion. Items and promo groups can be added. For more details, see Promotion Setup Form.

8. In the **How much?** section, configure the following promotion's basic parameters:

   a. In the **New price** field, specify the new price for the promoted item. This field is mandatory for the New Price promotion..

   b. In the **Promotion unit cost** field, specify the item cost for the promotion.

9. Configure the following promotion's settings:

   o **Reimbursement from Vendor**

   o **Timeframe**

   > ⓘ The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.

10. Scroll down to the **Promo Results** table and make sure the promotion is set up correctly. The promo results are calculated by the following formulas:

    o *Retail = Promo Price*

    o *Price Change = Promo Price - Current Retail + Buydowns*

For example, you set up a promotion in the following way:

- o The initial retail price for the promoted item is $1.19.

- o The promotion price is $1.00.

- o The reimbursement amount is $0.19.

In this case, in the **Promo Results** section, you will see the following values:

- o Retail: $1.00

- o Price Change: $1.00 - $1.19 + $0.19 = $0.00

Promo Result						
Station Name	**Retail**	**QTY**	**Price Change**	**Buydown**		
Cochran	$1.00	1	$0.00	$0.19	Explanation	

> ♀ To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

11. At the top of the promotion form, click **Save** to save the changes.

Price Each Mix Promotion

The Price Each Mix promotion gives customers a discount when they buy at least one item from one or more item groups. The promoted items are generally related to each other. For example, the Price Each Mix promotion can be used for the following campaigns:

- Buy a pizza roll and coke and get $1.00 off the price.
- Buy a hamburger and fountain drink at $7.95.

To set up a Price Each Mix promotion, you need to create several groups of items that will take part in the promotion, for example, a *Pizza Rolls* group and a *Coke* group. For each created group, you need to set up a separate discount. The Price Each Mix promotion supports the following types of discounts:

- **New price**: A new, specified price for promoted items applied as a total for all promoted items in a promo group.
- **Discount amount**: A specified discount as the exact amount.
- **Discount rate in percent**: A specified discount as the percent rate.

Please mind the following limitations depending on the cash register type:

- Bulloch CR: Only **New price** discount type is supported.
- Verifone Commander CR: The **New price** discount type is applied as a new retail for each promoted item in a promo group, not as a total.

> (i) For more information on cash register limitations, see .

Setting Up Price Each Mix Promotions

To set up a Price Each Mix promotion:

1. Go to **Price Book** > **Promotions**.

2. At the top of the **Promotions** form, click **Add New**.

3. In the **Promotion Name** field, enter the name for the new promotion.

4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.

5. In the **Promotion Type** list, select **Price Each Mix**.
   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.

6. In the **Priority** list, in case you have several promotions for same group of items, specify the priority in which the promotion will be applied on the cash register in order to be in compliance with the vendor policy. Possible values:

   o **Empty**: Leave the **Priority** field blank, if you have only one promotion for one certain group of items.

   o **From 0 to 10**: Define the promotion's priority by setting up the lowest value to the highest priority level.

   > ♡ The **Priority** field is only supported by Radiant cash registers. For more information on promotion compatibility, see .

7. In the **How much** section:

   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.

   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.

8. Configure promotion's promo groups. In the **What is included?** section, click **Promo Groups Included**.

   Result: The list of promo groups available for this promotion is displayed in the left column.

9. For each promo group to be added to the promotion:

   a. In the left column, select the promo group and click the **Add** button.

   Result: Selected promo group is added to the right column.

   b. In the right column, select the promo group and click the **Add List** button.

   Result: The promo group is added to the **How much?** section > promo groups.

c. In the **How much?** section > promo groups, double-click added promo group and specify the following settings:

- In the **Quantity** field, specify the number of items that a customer must purchase for the promotion to take effect.

- In the **Discount type** field, select the type of discount that you want to set for the promotion:

  - **New price**: Select this option if a new price for items in the group is to be set as a total for all promoted items in a promo group.
  - **Amount**: Select this option if a discount as the exact amount is to be specified.
  - **Percent**: Select this option if a discount as the percent rate is to be specified.

> ⊘ Please mind the following cash register limitations:
> - Bulloch CR: Only **New price** discount type is supported.
> - Verifone Commander CR: The **New price** discount type is applied as a new retail for each promoted item in a promo group, not as a total.

- In the **Discount** field, specify the new price or the discount value, depending on the discount type that has been selected. This field is mandatory for the Price Each Mix promotion

d. Click the **Update** button.

10. In the **Promotion unit cost** field, specify the item cost for the promotion.

11. In the **Taxation** list, select when the taxes must be calculated for items added to the promotion: **After discount** or **Before discount**.

12. Configure the following promotion's settings:

o **Reimbursement from Vendor**

o **Timeframe**

> ⓘ The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.

13. Scroll down to the **Promo Results** table and make sure the promotion is set up correctly. The results are calculated for each group separately and then summed up. The promo results are calculated by the following formulas:

   o Retail:
   - New Price: *Retail = Promo Price*
   - Amount: *Retail = (Current Retail * QTY - Amount Discount)*
   - Percent discount: *Retail = Current Retail - ((Current Retail / 100) * Discount Percent) *QTY*

   o Price Change:
   - New Price: *Price Change = Promo Price - (Current Retail * QTY) + Buydowns*
   - Amount: *Price Change = -(Amount Discount*QTY) + Buydowns*
   - Percent discount: *Price Change = -((Percent Discount*Current Retail/100) * QTY) + Buydowns*

For example, you set up a promotion in the following way:

- The initial retail price for the promoted item is $1.49.

- If a customer buys 2 items, the customer gets a discount of 10%.

- No reimbursement amount is set up.

In this case, in the **Promo Results** section, you will see the following values:

- Retail: $2.68 (for 2 items)

- Price change: -((10*1.49/100) * 2) = (0.30)

Promo Result

Station Name	Retail	QTY	Price Change	Buydown	Promo Resource	Station Taken Capacity	
Highland	$2.68	2	($0.30)	$0.00	$0.00	$0.00	Explanation

> To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

14. At the top of the promotion form, click **Save** to save the changes.

Price Modifier Promotion

The Price Modifier promotion gives customers a discount when they buy a specific number of items of the same type in a single purchase. For example, the Price Modifier promotion can be used for the following campaigns:

- Buy two cups of coffee at $3.25.
- Buy two donuts at $6.00.

> ⓘ For more information on cash register limitations, see Compatible Cash Registers.

Before You Begin

Before starting to set up the Price Modifier promotion, make sure the following conditions are met:

- **Allow Pricemodifier is ON**: The Allow Pricemodifier option is selected in the cash register settings.

  > ⓘ For details, see Station Options: Cash Register > select your cash register type.

- **Price > $0**: The promotion's price is more than zero.
- **Items QTY > 1**: The promotion's items quantity is more than one.

> ⚠ In case any of the above conditions is not met, the Price Modifier promotion is not sent to the cash register.

Setting Up Price Modifier Promotions

To set up a Price Modifier promotion:

1. Go to **Price Book** > **Promotions**.

2. At the top of the **Promotions** form, click **Add New**.

3. In the **Promotion Name** field, enter the name for the new promotion.

4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.

5. In the **Promotion Type** list, select **Price Modifier**.
   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.

6. In the **How much** section:

   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.

   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.

7. In the **What is included?** section, select the desired additions to be included in the promotion. You can add items and promo groups. For more details, see Promotion Setup Form.

8. In the **How much?** section, configure the following promotion's basic parameters:

   a. In the **New Price** field, specify the new price for the promoted items. In this field, you must specify the sum amount for all items for which the promotion is created. This field is mandatory for the Price Modifier promotion.

   b. In the **Qty Threshold** field, specify the number of items that a customer must purchase for the discount to be applied. This field is mandatory for the Price Modifier promotion.

   c. In the **Promotion Unit Cost** field, specify the item cost for the promotion.

9. Configure the following promotion's settings:

   o **Reimbursement from Vendor**

   o **Timeframe**: Only days can be configured for this promotion type without hours.

> The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.

10. Scroll down to the **Promo Results** table and make sure the promotion is set up correctly. The promo results are calculated by the following formulas:

o *Retail = Promo Price*

o *Price Change = Promo Price - (Current Retail * QTY)+ Buydowns*

For example, you set up a promotion in the following way:

- The initial retail price for the promoted item is $0.50.

- The quantity threshold is 2.

- The new price for 2 items is $0.90.

- No reimbursement amount is set up.

In this case, in the **Promo Results** section, you will see the following values:

- Retail: $0.90

- Price Change: $0.90 - ($0.50 * 2) = ($0.10)

Promo Result					
Station Name	**Retail**	**QTY**	**Price Change**	**Buydown**	
Cochran	$0.90	2	($0.10)	$0.00	Explanation

> To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

11. At the top of the promotion form, click **Save** to save the changes.

Price Reduction Promotion

Price Reduction promotions give customers a discount on specific items at a certain period of time. This type of promotion is used to drive the product interest or clear the product stock.

With the Price Reduction promotion type, only one discount type can be set up — the discount amount off a regular item price. For example, if the regular item price is $5.95, a $0.70 discount can be set up, and the resulting promotion price will be $5.25.

> (i) For more information on cash register limitations, see Compatible Cash Registers.

Setting Up Price Reduction Promotions

To set up a Price Reduction promotion:

1. Go to **Price Book** > **Promotions**.

2. At the top of the **Promotions** form, click **Add New**.

3. In the **Promotion Name** field, enter the name for the new promotion.

4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.

5. In the **Promotion Type** list, select **Price Reduction**.
    Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.

6. In the **How much** section:

   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.

   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.

7. In the **What is included?** section, select the desired additions to be included in the promotion. Items and promo groups can be added. For more details, see Promotion Setup Form.

8. In the **How much?** section, configure the following promotion's basic parameters:

   a. In the **Price reduction** field, specify the discount amount off the regular price. This field is mandatory for the Price Reduction promotion.

   b. In the **Promotion unit cost** field, specify the item cost for the promotion.

9. Configure the following promotion's settings:

   o **Reimbursement from Vendor**

   o **Timeframe**

   > ⓘ The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.

10. Scroll down to the **Promo Results** table and make sure the promotion is set up correctly. The promo results are calculated by the following formulas:

    o *Retail = Current Retail - Discount Amount*

    o *Price Change = -Discount Amount + Buydowns*

For example, you set up a promotion in the following way:

- o The initial retail price for the promoted item is $1.19.

- o The discount amount is $0.10.

- o The reimbursement amount is $0.05.

In this case, in the **Promo Results** section, you will see the following values:

- o Retail: $1.19 - $0.10 = $1.09

- o Price Change: -$0.10 + $0.05 = ($0.05)

Promo Result					
Station Name	Retail	QTY	Price Change	Buydown	
Cochran	$1.09	1	($0.05)	$0.05	Explanation

> 💡 To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

11. At the top of the promotion form, click **Save** to save the changes.

Working with Promotions

The following actions can be performed with promotions:

- Add a new promotion

- Edit a promotion

- Delete a promotion

- End a promotion

- Continue a promotion

- Work with the promotions list

- View promotions reports

Adding New Promotion

Before adding a new promotion, make sure the following conditions are met:

- The items you are going to add to a promotion are active. A promotion cannot be applied to inactive items. For more information on how to check if the item is active or not, see Viewing Inactive Items.

- The **Allow users to set up Promotions** permission is granted to your user. For more information

on how to grant a permission to the user, see Roles Management Permissions.
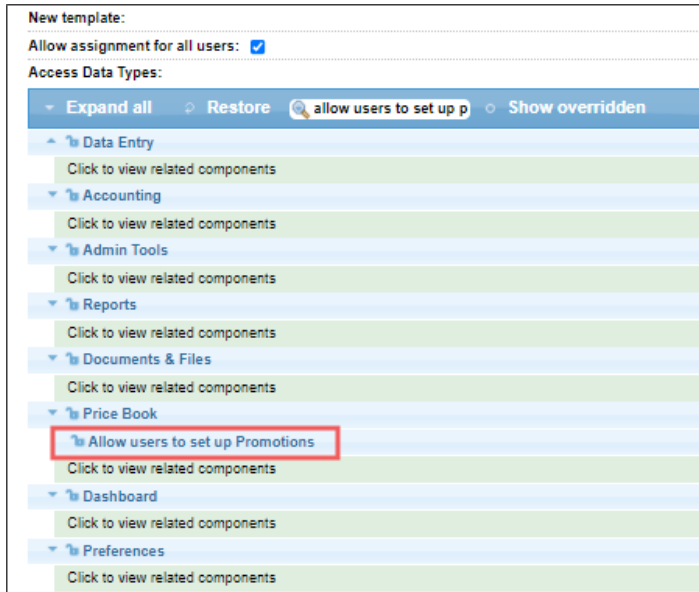
To add a new promotion:

1. On the main tool bar, click **Price Book** > **Promotions**.

   Result: The list of promotions is displayed.

2. At the top of the promotions list, click **Add New**.

   Result: A new window with the promotion setup form opens.

3. If a combo is going to be created, click **Combo**.

4. Depending on the type of promotion being created, enter all the conditions for the promotion as described in one of the following sections:

5. Click **Save** at the top of the page.

   Result: The promotion or combo has been added to the system.

Once the promotion is in the **Item Updates** section on the Homepage, it can be sent to the cash registers.

> ⓘ All new (created within the last seven days) promotions or combos are marked with a green asterisk in the promotions list.

Promotion Setup Form

The Promotion Setup form includes the following sections for configuring promotion settings:

- Promotion Header
- What is Included?
- How Much?
- Promo Results
- Promo Errors

Promotion Header

The information at the top of the page identifies the promotion in CStoreOffice® and in the cash registers. The Promotion Header consists of the following settings:

- **External Promo #**: External promotion identifier. This field is populated automatically by the system and displayed under the following conditions:

  - Only for Radiant cash registers;

  - If the **Send External Promo # to CR** option is selected at the **Cash Register** form at **Data Entry** > **Dashboard** > **Station Options** > **Cash Register** > **Advanced** > **Advanced**;

  - If the **Allow user to edit Permission for External promo ID** permission is activated for the current user.

  > ⓘ In case one promotion is created for several locations, it will be saved with the same External Promo # value for each location.

- **Promotion Name**: This is the name of the promotion in CStoreOffice®.

- **Receipt CR Description**: This is the name of the promotion in the cash register. It cannot exceed ten characters including spaces.

- **QwickServe Description**: This field is available only for the customers who have the SmartPOS cash register or use the QwickServe solution. In this field, enter the promotion's name to be displayed on the QwickServe device.

- **CRIND**: This stands for Card Readers in Dispenser (initially a Gilbarco term, now used generically). A message that will appear during the customer's transaction at the pump credit card reader can be entered.

> ⊘ This parameter is currently supported only by the Gilbarco cash register.

- **Promotion Type**: Select the promotion type based on which the promotion parameters of the corresponding promotion type will become available for setup in the **How much?** section.

> ⓘ For more information about available promotion types, see Promotion Types.

- **Priority**: In case you have several promotions for same group of items, specify the priority in which the promotion will be applied on the cash register in order to be in compliance with the vendor policy. Possible values:

  o **Empty**: Leave the Priority field blank, if you have only one promotion for one certain group of items.

  o **From 0 to 10**: Define the promotion's priority by setting up the lowest value to the highest priority level.

> 💡 The **Priority** field is supported only by the Radiant cash registers and available only for the Mix & Match, Price Each Mix, and Link Saver promotion types. For more information on cash register limitations, see Compatible Cash Registers.

External Promo #	
Promotion Name	Link Saver Promotion
Receipt CR Description	Link Saver
Qwickserve Description	
CRIND	
	Write a message here that will appear during the customer's transaction at the pump credit card reader.
Promotion Type	Link saver ▼
Priority	3 ▼
	❗ Supported only for radiant cash register

What is Included?

In this section, define which items will be included in the promotion:

- **Items Included**. If this option is selected, the Items page is opened in a new window. Follow these steps:

    a. Use the Find and Replace tool to find the necessary items.

    b. Select the items to be included in the promotions.

   c. Click the **Append all to List** button above the items list.

On the page for setting up the promotion, boxes with items appear below in the same section.

    d. Add the items to be included in the promotion to the right box. You can also remove the items from the right box if you want them excluded from the promotion, or click **Find Again** and repeat steps from *a* through *d* to add more items.

- **Promo Groups Included**. If you select this option, the boxes with promo groups appear.
    ADDING PROMO GROUP TO PROMOTION

    1. In the left column, select the promo group you want to add.

    2. Click the **Add** button.

    3. In the right column, select the added promo group.

    4. Click the **Add List** button.
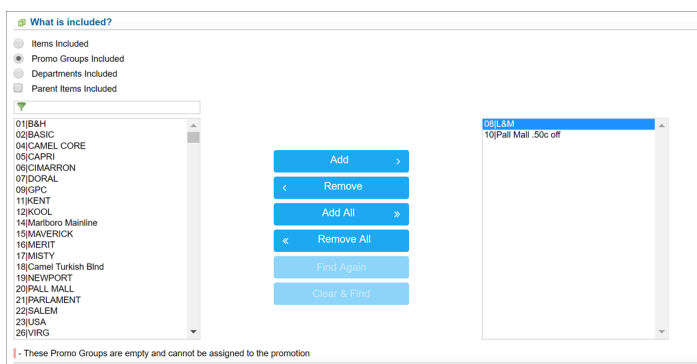
Result: The promo group is added to the **Groups** table in the **How much?** section.>

- **Departments Included**. This option is currently not supported by the cash registers. For more information on cash register limitations, see Compatible Cash Registers.
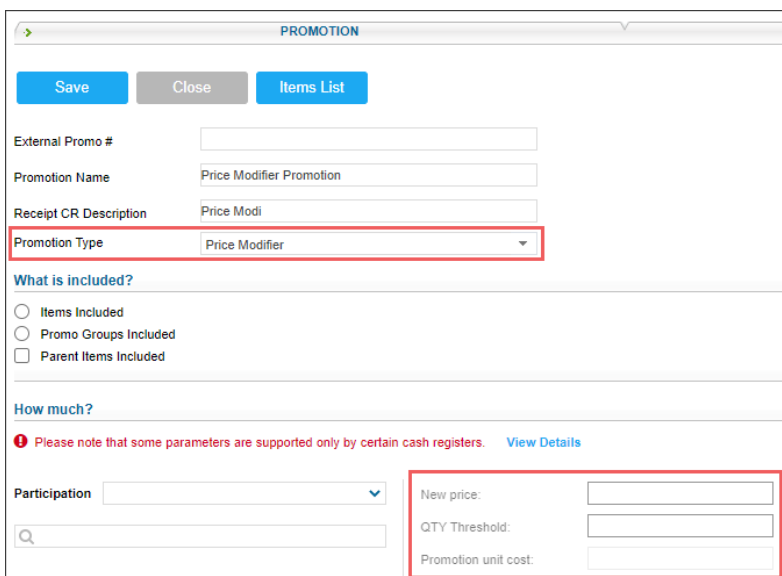
- **Parent Items Included**. Select this option, if you want to include the parent items in the promotion.

How Much?

In the **How Much?** section, define the following conditions for the promotion:

1. **Promotion location**. Do the following:

   o In the **Participating** list, select the type of the promotion's location or tag.

   o Below the **Participation** list, activate one or several locations participating in a promotion.

2. Configure the following promotion's basic parameters:

   o **Promotion unit cost**: A new item's cost agreed with the vendor. It is recommended to populate this field, if you are creating a promotion for one item only, such as New Price or Price Reduction promotion. If an item has a new cost defined within a promotion, it entails the following changes for this item:

      - A new cost from the **Promotion unit cost** field is valid for the promotion's item throughout all promotion's activity period.

      - The promotion unit cost is considered as the negotiated item's cost. For more information about the difference between the item's promotion and negotiated cost, see Setting Up Item Cost.

   o **Price change**

   o **Price reduction**

> ♀ Promotion's basic parameters are displayed depending on the selected **Promotion Type** value.

For more information about how to configure basic promotion parameters for each promotion type, see the corresponding promotion type subsection in the Promotion Types section.

3. In the **Reimbursement from Vendor** section, configure the reimbursement from the vendor in case the promotion implies it:

o In the **Reimburse** list, select the vendor who will reimburse the discount.

o In the **... per... units** fields, enter the number of items per units, which are bought or sold in order to get the reimbursement.

o Select **Sold** or **Purchased**, to define whether the reimbursement is paid at purchase or at sale of the items. This option affects the accounting.

> If you need to set up reimbursements from several vendors, click **Add** and for each vendor set up the reimbursement settings as described above.

AN EXAMPLE OF THE REIMBURSEMENT CALCULATION

> *A Marlboro 65 cents off promotion is set up in the following manner:*
>
> *Price Reduction = $0.65*
> *Reimburse = $0.15 from Phillip Morris*
>
> *In other words, the items with this promo will be sold at 65 cents off, and when an item is sold, 15 cents will be returned by Phillip Morris. The 15 cents is considered a Buydown, and a price change will be calculated for the remaining 50 cents (65 - 15 = 50).*
>
> *When taking 130 packs of Marlboro cigarettes into consideration, the total price change will be $65, not $84.5. However, the items should go to inventory at full price, as both the Price Change and Buydown will be taken off (Price Change $65 + Buydown $19.50 = $84.50).*

> Inclusion in a promotion does not reduce the current retail for the item. Promo items continue to be taken to inventory at their full price.

- If the cash register is connected to the server, the quantity of the items sold by each promotion and the total Price Change and Buydown included in the shift reports will be

seen.

- If the cash register is not connected to the server, look in the forms Data Entry/Store/Price Change and Data Entry/Store/Buydown for daily lists of active promotions. The quantity of the items sold by each promotion will have to be entered manually.

4. In the **Time frame** section, specify the period of promotion activity:

   o In the **Start** field, select the promotion starting date.

   o In the **From To** fields, specify the promotion active hours. Select the promotion's active weekdays, if needed.

   o In the **End** field, select the promotion ending date, if any. In case the promotion's ending date and time are not specified, click **Indefinitely**.

5. At the top left of the **Promotion Setup** form, click the **Save** button.

Once the promotion is saved, the following promotion's settings in the **How much** section cannot be edited:

- Type of the promotion's location - in the **Participation** list: You cannot edit the type of the promotion's location but can edit the number of the locations participating in the promotion.

- Promotion's type - in the **Promotion Type** list: The promotion's type cannot be edited, however, the promotion's conditions for the selected locations can be edited.

> ⓘ If a promotion with the division type in the **Participating** list is being edited, activate at least one division to enable editing in the **How much?** section.

Promo Result

This section displays the promotion result. Each promotion type has its own promo results.

> ⓘ The detailed explanation of the promo results section for each promotion type is available in the corresponding help article in the Promotion Types section.

Promo Errors

This section displays system error messages, in case the items included in the promotion don't match one or several of the following criteria:

- Items don't exist on the selected station.

- Current Retail Price, Department, or Category are not specified for the items.
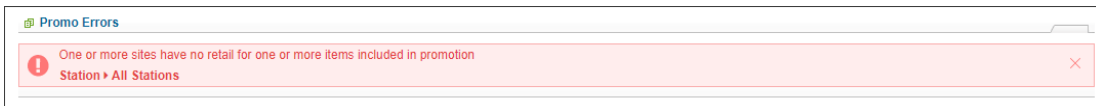
Combo Setup Form

The Combo Setup form includes the following sections for configuring the combo settings:

- Combo Header

- What is Included?

- How Much?

- When?

- Where are?

- Promo Errors

Combo Header

The information at the top of the page identifies the combo promotion in CStoreOffice® and in the cash registers.

Field	Description
External Promo #	External combo identifier. This field is available under the following conditions: - only for Radiant cash registers - if the **Send External Promo # to CR** option is selected at the **Cash Register** form at **Data Entry** > **Dashboard** > **Station Options** > **Cash Register** > **Advanced** > **Advanced** - if the **Allow user to edit Permission for External promo ID** permission is activated for the current user

Field	Description
	ⓘ In case one combo is created for several locations, it will be saved with the same External Promo # value for each location.
Combo Name	This is the name of the combo in CStoreOffice®.
Combo Receipt CR Description	This is the name of the combo in the cash register. It cannot exceed ten characters including spaces.
CRIND	This stands for Card Readers in Dispenser (initially a Gilbarco term, now used generically). A message that will appear during the customer's transaction at the pump credit card reader can be entered. ⚠ This parameter is currently not supported by the cash registers.
Product Code	This is the code assigned to a combo for identifying it as an item at the cash register.
Soft Key Number	This is the number of the soft key assigned to this combo on the cash register. ⓘ Supported only by Ruby and Sapphire registers.
Priority	In case you have several promotions for same group of items, specify the priority in which the promotion will be applied on the cash register in order to be in compliance with the vendor policy. Possible values: - **Empty**: Leave the Priority field blank, if you have only one promotion for one certain group of items. - **From 0 to 10**: Define the promotion's priority by setting up the lowest value to the highest priority level. 💡 The **Priority** field is supported only by the Radiant cash registers. For more information on cash register limitations, see Compatible Cash Registers.

Above these fields, there are also buttons for saving the changes made to the combo and closing the form without saving the changes.

What is Included?

In this section, the following needs to be defined:

- The items to be included in the combo. For details, see Including Items in Combo.

- The settings these items will have. For details, see Configuring Items Settings for Combo.

Including Items in Combo

The following types of items may be included in the combo:

- Items: Including common items to your combo.

- Fuel :Including any type of fuel on the station to your combo

- Car Wash :Including to your combo the items from the following types of departments:

  o 'Car Wash' departments

  o 'Other Income' departments where the Income Type value equals 'Car Wash' or 'CarWash'.

> ⓘ The combo may contain a minimum of two and a maximum of five items.

All types of items included in the combo are displayed in the second column in the What is Included? section.

Adding Items to Combo

To select the items for the combo, follow these steps:

1. Click **Find Items** to add the desired items to the left column.
   Result: The **Items** list opens in a new window.

2. Use the Find and Replace tool to find the necessary items.

3. Select the items to be included in the combo.

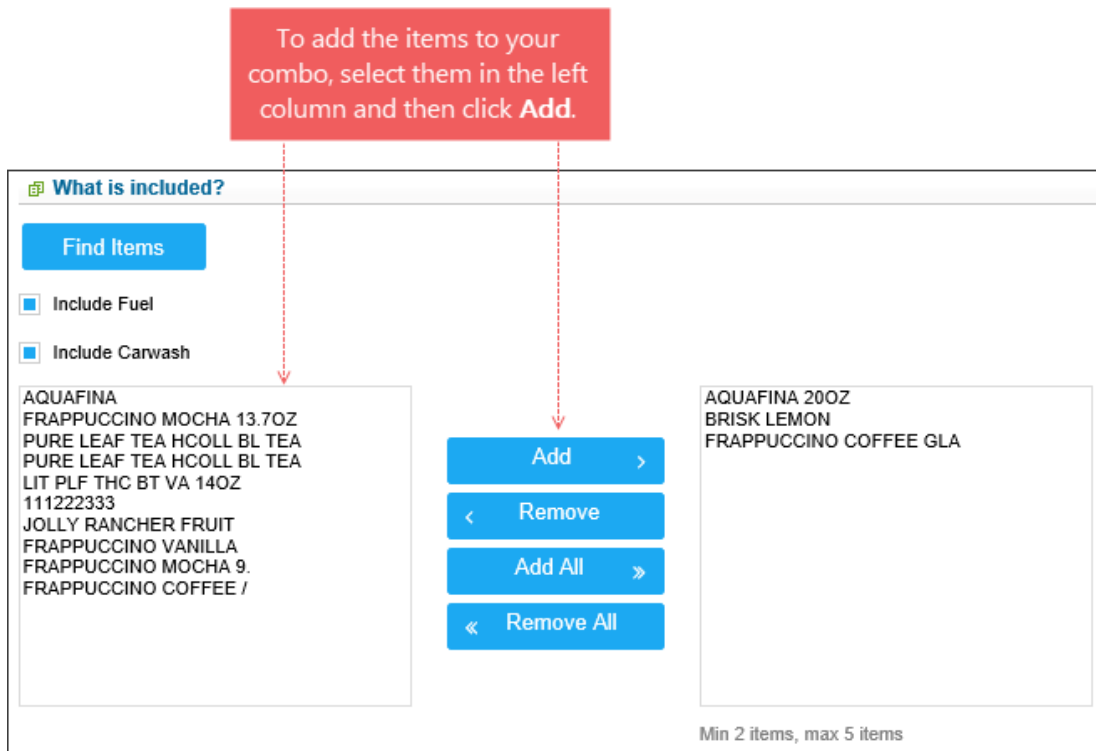4. Click the **Append all to List** button above the items list.

   Result: The selected items appears in the **What is included** section in the left column.

5. In the **What is included?** section > left column, select the desired items to add to the combo.

6. On the right of the left column, click **Add**.

To add the items to your combo, select them in the left column and then click **Add**.

> 💡 To remove the items from the combo column, select them and click **Remove**.
> To add all items from the left column to the combo column, click **Add All**.
> To remove all items from the combo column to the left column, click **Remove All**.

Adding Fuel to Combo

To add the fuel to the combo, select the **Include Fuel** option.

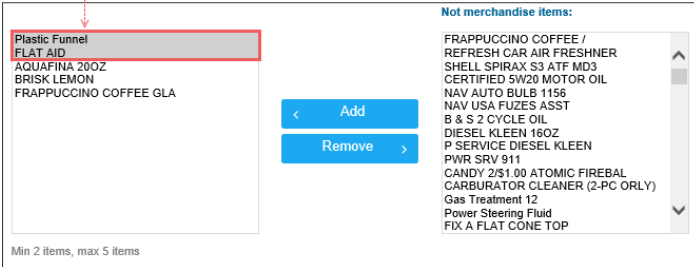To remove the fuel from the combo, clear the **Include Fuel** option.
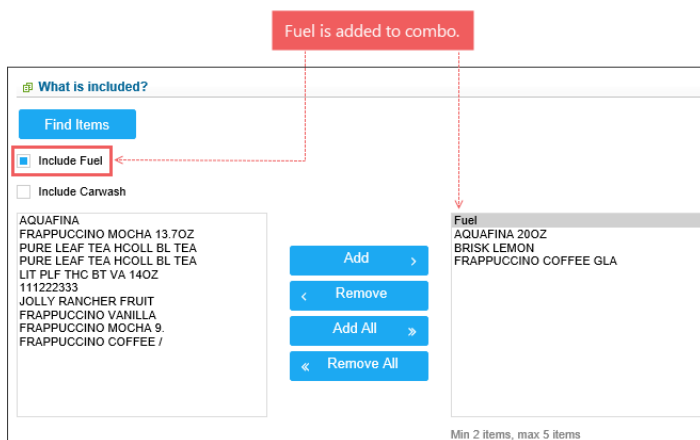
Adding Car Wash Items to Combo

To add the car wash items to the combo, follow these steps:

1. Select the **Include Carwash** option.
   Result: All available non-merchandise items appear in the **Not merchandise items** column.

2. In the **Not merchandise items** column, select the desired items to be added to the combo.

3. On the left of the **Not merchandise items** column, click **Add**.

   Result: The items are added to the combo column.

> 💡 To remove the non-merchandise items from your combo, on the left of the **Not merchandise items** column, click **Remove**.

Two non-merchandise items are added to the combo column. They are highlighted with gray color.

Configuring Items Settings for Combo

In the **What is included** section, the following items settings can be configured for the combo:

- **ID Required**: Select this check box to enable the requesting support documents option for this combo.

- **Refund Allowed**: Select this check box to enable the transactions refund for this combo.

- **Accept food stamps**: select this check box to allow using food stamps to pay for this combo.

- **Tax 1** and **Tax 2**: Select the taxes to be applied to the combo.

> ℹ️ For more information about items taxes, see Setting Up Item Taxes.

- **Apply Tax before Discount**: Select this option to calculate the tax amount before applying the combo price and send this tax amount to a cash register (only for Ruby Sapphire cash registers). Make sure the 'Allow Tax before Mix and Match Discount' option is selected at **Data Entry** >

Dashboard > **Cash Register** > **Advanced**.

How Much?

In the **How Much** section, for each item included in the combo, specify the following parameters:

- **Quantity**: The number of items to be sold together within this combo.

- **Discount**: The value of discount selected in the Discount type column and applied to this item. This field is mandatory for the Combo promotion.

- **Discount type**: One of the following discount types:

  o **New price**: Replaces the current item price by the predefined price value.

  o **Amount**: Reduces the item price by the predefined amount.

o **Percent**: Reduces the item price by the predefined percent.

Buydown

This section does not have a heading and is just below the **How Much?** section. If the combo implies a buydown from the vendor, enter the buydown information here. Leave the section blank if the combo is not eligible for a buydown.

- **Reimburse**: Select this check box if the combo provides the Buydown. Enter the Buydown amount in the field to the right.
- **Per....Units**: This is the number of items units, which are bought or sold in order to receive the Buydown.
- **Sold or Purchased**: Mark whether the Buydown is applied at the time items are purchased or sold. This option affects accounting.

- **Vendor**: In the line below, select a vendor who will be returning the Buydown. Upon setting all necessary parameters, click **enter**.

> ℹ️ Sometimes the Buydown is paid not by one but by several vendors, in such case it is necessary to enter each vendor's conditions into the combo settings.

The difference between the price reduction and the total reimbursement will automatically be calculated by the system.

> ℹ️ Inclusion in a combo does not reduce the current retail for the item. Combo items continue to be taken to inventory at their full price.

- If the cash register is connected to the server, the quantity of the items sold by each combo and the total Price Change and Buydown included in the shift reports will be seen.
- If the cash register is not connected to the server, look in the forms Data Entry/Store/Price Change and Data Entry/Store/Buydown for daily lists of active combos. The quantity of the items sold by each combo will have to be entered manually.

> 📄 ***Example of a buydown calculation***
>
> *A Marlboro 65 cents off promotion is set up in the following manner:*
>
> *Price Reduction = $0.65*
> *Reimburse = $0.15 from Phillip Morris*
>
> *In other words, the items with this combo will be sold at 65 cents off, and when an item is sold, 15 cents will be returned by Phillip Morris. The 15 cents is considered a Buydown, and a price change will be calculated for the rest 50 cents (65 - 15 = 50).*
>
> *When taking 130 packs of Marlboro cigarettes into consideration, the total price change will be $65, not $84.5. However, the items should go to inventory at full price, as both the price change and buydown will be taken off (Price Change $65 + Buydown $19.50 = $84.50).*

When?

In this section, define the time frame of the combo:

- Use the calendar icon to set the start date.
- Use the calendar icon to set the end date or select the **Indefinitely** check box if your combo does not have an end date.

Where are?

In this section, select the locations on which your combo will be active.

To select one or several locations for the combo, follow these steps:

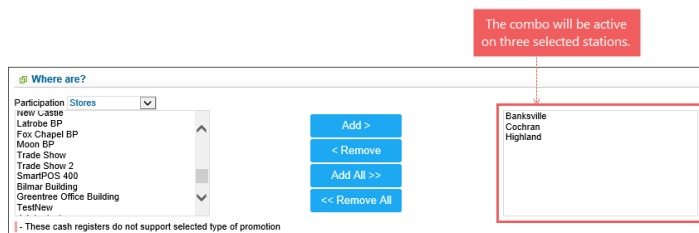1. In the **Participation** list, select the type of the combo's location.
   Result: The list of locations for the selected type is displayed in the left column.

2. In the left column, select the locations for which the combo is being created.

3. Click **Add**.

   Result: The locations are added to the right column. The combo will be active for these locations.


To remove the locations from the right column, select them and click **Remove**.
To add all locations from the left column to the right column, click **Add All**.
To remove all locations from the right column to the left column, click **Remove All**.

Promo Errors

This section displays system error messages, in case the items included in the combo don't match one or several of the following criteria:

- Items don't exist on the selected station.

- Current Retail Price, Department, or Category are not specified for the items.
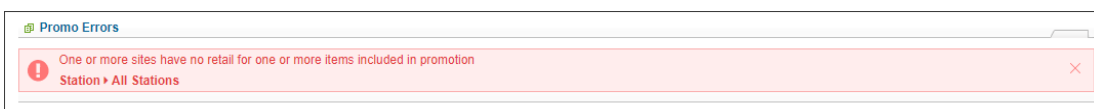
Editing Promotion

Before editing an active promotion, make sure the following conditions are met:

- You have an access to all sites or locations for which the promotion is activated. If the promotion is activated for at least one site or location inaccessible to your user, the promotion cannot be edited. The sites or locations activated for the promotion can be checked in the **Participation** list of the **How much?** section. For more information on how to configure the Participation list, see How much?.

- The **Allow users to change Promotions** permission granted to your user. For more information about granting permissions, see Roles and Permissions Management.
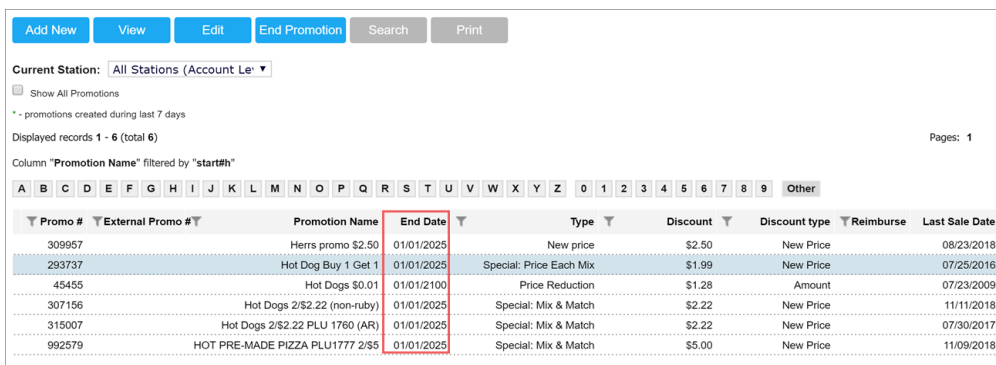
> ⊘ It is strongly recommended not to edit the existing promotions that are actively used at your locations as it may affect the data accuracy. In these cases, we recommend to create new promotions. For details, see Adding New Promotion.

To edit an existing promotion or combo:

1. Open the **Promotions** list. In the CStoreOffice® main menu, click **Price Book** > **Promotions**.

2. In the **Promotions** list, find a promotion or combo you want to edit.

3. Make sure the promotion or combo is active. Check the promotion's or combo's end date—it should be greater than the current date.

> ⓘ For information on how to continue inactive promotion or combo, see Continuing Promotion.

4. Select the promotion or combo, and then click **Edit**.

5. Edit the promotion's or combo's settings. For more details, see the Promotion Setup Form or Combo Setup Form correspondingly.

> ⊘ Not all settings of active promotions are editable. To view the whole list of editable settings, see Editable Settings of Active Promotion.

> 💡 In the **How much** section, the **Participating** and **Promotion type** values are not editable.

6. At the top left of the promotion or combo setup form, click **Save**.

7. This is optional - In case you are changing the promotion period or making other essential changes in a promotion's settings, in the **Save Window** that is displayed, select one of the following options and then click **Save**:

o **Create new Promotion** - creating a new promotion based on the current promotion settings

o **Edit current Promotion** - editing current promotion and making promotion recalculation for the selected period
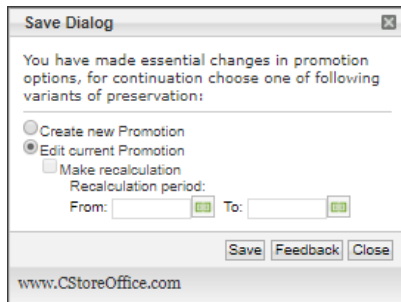
Editable Settings of Active Promotion

- In the promotion header - Change promotion name or description.

- In **What is included?** section - Change items included to the promotion.

- In the **Loyalty** section - Change promotion loyalty settings.

- In the **How much?** section - Change the number of stores, companies, stations, or divisions participating in the promotion and update the promotion settings.

> (i) You cannot change the type of the promotion's location and the promotion type.
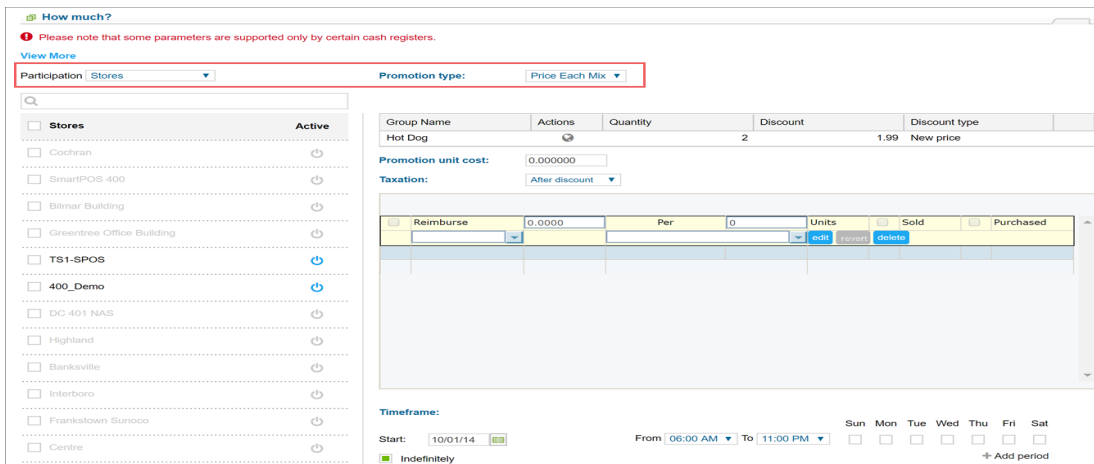
You can also continue promotion expiring soon or inactive ended promotion. For more details, see Continuing Promotion.

Deleting Promotion

You can delete only promotions which have not begun yet. The starting date of such promotions is older than the current date. All active promotions with the starting date which is less than the current date can be only ended, but not deleted.

> ⓘ For more information about how to end an active promotion, see Ending Promotion.

To delete a promotion:

1. From the main CStoreOffice® menu, go to **Price Book** > **Promotions**.

   Result: The Promotions list opens.

2. In the **Promotions** list:

   a. Select the promotion you want to delete.

   > 💡 Make sure the promotion's starting date is older than the current date. You can check it in the **Start Date** column.

   b. In the promotion setup form, click **Delete**.

   The **Delete** button is displayed only if the promotion's starting date is older than the current date. Otherwise, the **End Promotion** button is displayed instead.

c. Confirm the deletion.

Ending Promotion

Ended promotions become inactive in CStoreOffice® and do not apply to the items anymore. Ended promotion cannot be reactivated again as it may affect the data accuracy.

> ⊘ Before you end a promotion either for a separate station or for the whole account, make sure you do not need to use this promotion in the future. If so, you can create a new one by copying the ended promotion. For details, see Continuing Promotion.

You can end a promotion in the following ways:

- Ending a Promotion for the Whole Account
- Ending a Promotion for a Certain Location or Tag

To make sure the promotion is ended, check it in the Promotions list. For details, see Viewing the Ended (Inactive) Promotions.

> ⊘ You cannot deactivate the promotion, if it has the items from the category that has the **Block Promo Acceptance** option activated. For details, see Categories.

Ending a Promotion for the Whole Account

To end a promotion or a combo for the whole account:

1. From the main CStoreOffice® menu, go to **Price Book** > **Promotions**.
   Result: The Promotions list opens.

2. In the **Promotions** list:
   a. Select the promotion you want to end.
   b. Click the **End Promotion** button.

> 💡 Please note that the **End Promotion** button is permission-based. It is displayed only for the users with the **Allow users to End Promotion on the Promotion form** permission granted.

c. Confirm the **End Promotion** operation.

d. Accept changes to send them to the cash register. For details, see Reviewing and Accepting Changes.

In order not to accept changes manually each time a promotion is updated, you may activate the **Accept Price Book changes automatically** option in the cash register settings in CStoreOffice®. For details, see Accepting Promotion Changes Automatically.

Ending a Promotion for a Certain Location or Tag

To end a promotion for a certain tag, such as Division, Area Manager, Price Zone and so on, follow the steps from the procedure below.

> 💡 If you need to end a for a certain location (Stores or Location tag), at first end the whole promotion (see Ending a Promotion for the Whole Account) and then create this promotion again only for the locations (stations) you need.

(For non-store promotion locations only) To end a promotion for a certain location or tag:

1. From the main CStoreOffice® menu, go to **Price Book** > **Promotions**.
   Result: The Promotions list opens.

2. In the **Promotions** list:
   a. Select the promotion you want to end.
   b. Click the **Edit** button.

Promo #	External Promo #	Promotion Name	End Date	Type	Discount	Discount type	Reimburse	Last Sale Date
2149635		* #434234235	01/01/2025	Special: Mix & Match	$1.00	New Price		
2149475		#beta23	01/01/2025	Special: Link Saver	$25.00	Amount		
2149452		#tg0-32	01/01/2025	Special: Link Saver	2.00%	Percent		

Result: The Promotion editing form opens.

3. In the Promotion editing form, go to the **How much?** section > **Participation** list.

4. In the **Participation** list, deactivate location or another tag, for which you want to end a promotion.

5. At the top left of the form, click **Save**.

> ⊖ Please note that if **Stores** or **Location** is selected in the **Participation** list and you deactivate one or several locations (stations) for the promotion, you can only save these changes by creating a new promotion.

6. Accept changes to send them to the cash register. For details, see Reviewing and Accepting Changes.

> ♀ In order not to accept changes manually each time a promotion is updated, you may activate the **Accept Price Book changes automatical**ly option in the cash register settings in CStoreOffice®. For details, see Accepting Promotion Changes Automatically.
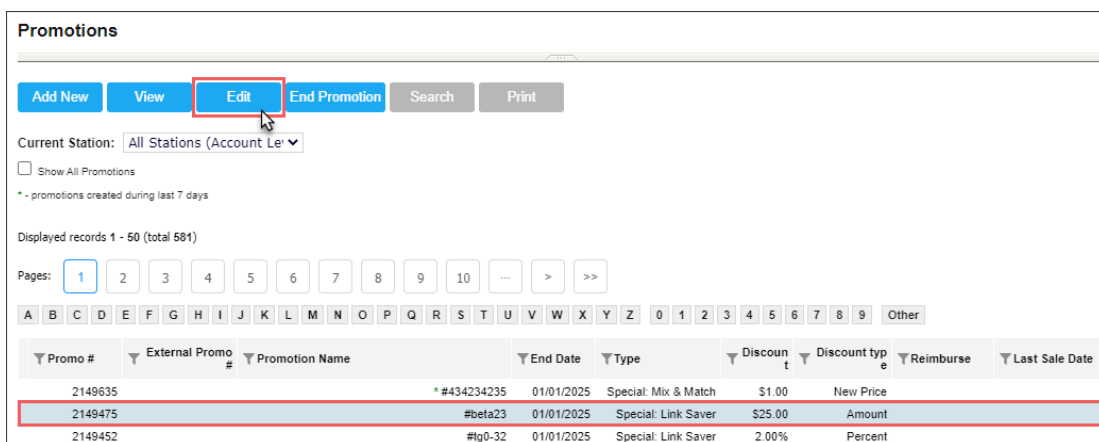
Viewing the Ended (Inactive) Promotions

To view the ended or inactive promotions:

1. From the CStoreOffice® home page, click **Price Book** > **Promotions**.

2. In the **Promotions** list, click **Show All Promotions**.

   Result: The list of Promotions reloads to display all promotions including that of ended or inactive

promotions.

ⓘ The names of ended or inactive promotions include the following tag in parentheses at the end: *(Old YYYY-MM-DD HH:MM:SS)* where the YYYY-MM-DD and HH:MM:SS values indicate the promotion's ending date and time correspondingly. This tag is added automatically once a promotion is ended.

Continuing Promotion

A promotion can be continued in the following two ways:

- Continue active promotion expiring soon
- Continue inactive or ended promotion

Continuing Active Promotion Expiring Soon

To continue an active promotion expiring soon, follow these steps:

1. Open the **Promotions** list. In CStoreOffice® main menu, click **Price Book** > **Promotions**
2. In the **Promotions** list, find a promotion or a combo that is to be continued.
3. Select this promotion or combo and then click **Edit**.
4. Go to the **How much?** section > **Participation**.
5. Select all objects for which you need to continue the promotion.

   💡 For all active unselected objects in the Participation section, the promotion's ending date will remain the same.

6. Go to **Timeframe** and then do one of the following:

o In the **End** field, select the new date for the promotion or combo.

o Click **Indefinitely**, to leave the end date open.

7. At the top left of the **Promotion Setup** form, click the **Save** button.

Continuing Inactive or Ended Promotion

To create a copy of inactive or ended promotion or combo, follow the steps:

1. Open the **Promotions** list. In CStoreOffice® main menu, click **Price Book** > **Promotions**

2. In the **Promotions** list, find a promotion or combo that is to be copied.

> To view inactive or ended promotions in the search results, select the **Show All Promotions** check box in the **Promotions** list.

3. Select an inactive promotion or combo, and then click **Edit**.

4. At the top left of the **Promotion Setup** form, click the **Create Copy** button.

5. Edit the new promotion's or combo's settings. For more details, see Editing Promotion.

> ☉ You can use the same name as that of the ended promotion. The active and ended (inactive) promotions with the same name are differentiated by the special tag which is added automatically in parentheses at the end of the ended promotion's name. For details, see Ending Promotion.

6. At the top left of the **Promotion Setup** form, click the **Save** button.

Sending External Promo ID to the Cash Register

If you use the External Promo ID parameter while working with promotions, use the following recommendations for processing this parameter properly in CStoreOffice®:

- How to populate the External Promo ID field automatically.
- How to send the External Promo ID values to newly connected stations.
- How to send the External Promo ID values to the existing stations with promotions.

Populating the External Promo ID Field Automatically

It is possible to populate the **External Promo ID** field in the Promotion Setup form automatically by the system. This requires the **Autogenerated external promo id for Promotions** option to be turned on in the account settings.

> ⓘ For more information on how to set up the promotion, see Adding New Promotion. To adjust your account settings in CStoreOffice®, submit a ticket to the Petrosoft Support team.

Sending the External Promo ID Values to Newly Connected Stations

Before sending the price book from CStoreOffice® to the newly connected stations, make sure the following conditions are met:

- The **Allow user to edit Permission for External promo ID** permission is turned on for the user.
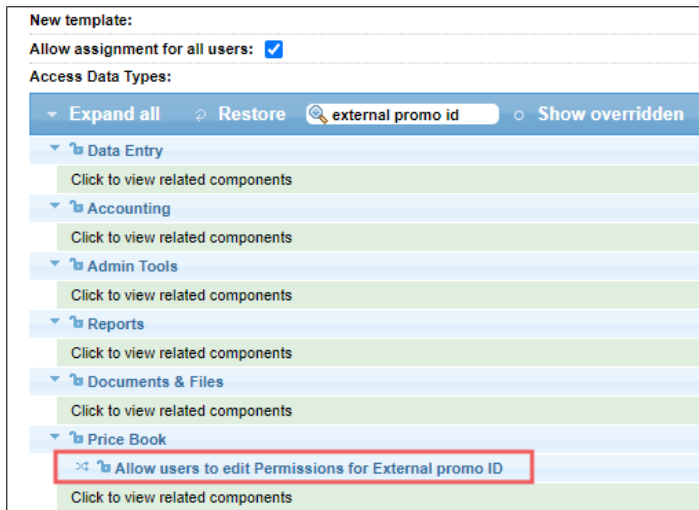
> ℹ️ For more information on how to grant a permission to the user, see Roles Management Permissions.

- The **Send external promo # to CR** option is turned on in the station's **Advanced Settings** form.
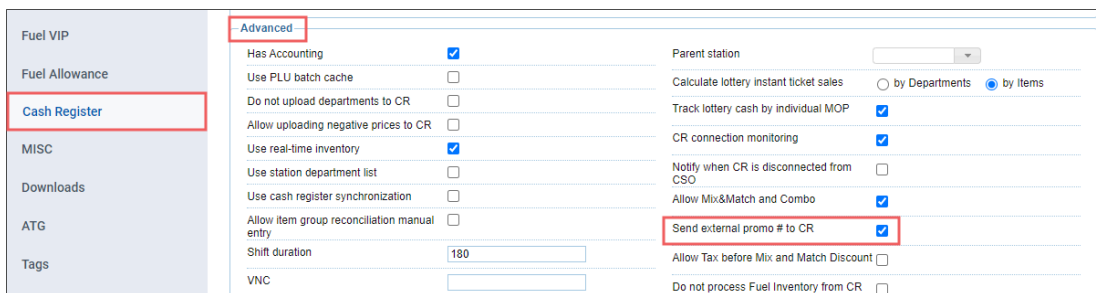
With the **Send external promo # to CR** option turned on, the External Promo ID values in the promotions configured in CStoreOffice® to the cash registers.

> ℹ️ For more information on how to work with the station's Advanced Settings form, see Advanced Settings.

Sending the External Promo ID Values to the Stations with Promotions

If you need to replace the internal Promo # values in your existing promotions with the External Promo ID values from the promotions configured in CStoreOffice®, send the price book updates to the cash register with the following parameters:

- Select the **Wipe out CR Promotions on next sync** option in the cash register settings section of the station options form.

Please note that after updates are sent and changes are accepted, the **Wipe out CR Promotions on next sync** option becomes unselected automatically.

For more information on how to work with the cash register settings section, see Cash Register Settings.

- Select the **Send external promo # to CR** option must be selected in the **Advanced Settings** section of the station options form.

For more information on how to work with the station's Advanced Settings form, see Advanced Settings.

The procedure for sending price book updates from CStoreOffice® to the cash register is described in the Reviewing and Accepting Changes section.

Working with Promotions List

To open the **Promotions** list,
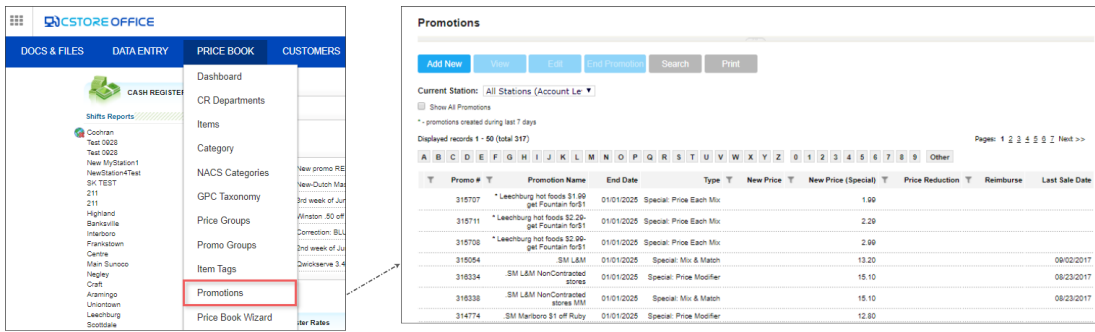
The following operations can be performed with the promotions in the Promotions list:

- Searching for promotions
- Making advanced promotion search
- Filtering search results
- Customizing search results
- Viewing promotions that will be run in the future

Searching for Promotions

To find promotions:

1. In the **Promotions** list, expand the **Find and Replace** tool.

2. In the left menu, click **Find**.
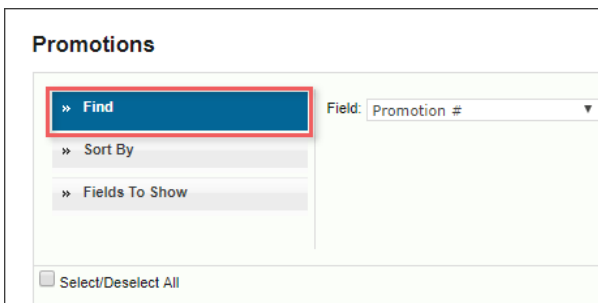
3. To find each field in the table, specify the following parameters:
   a. **Desired field**: Select the field based on which the search criteria should be specified.
   b. **Search operator**: Select one of the following search operators:
      - **Like**: Select this operator to find promotions with values similar to search values in the desired field.
      - **Equal**: Select this operator to find promotions that match the search value in the desired field.
      - **Empty**: Select this operator to find all the promotions for which there is no such entry in the desired field.
      - **Exclude**: Select this operator to find all promotions with no search value in the desired field.

- **More than**: Select this operator to find all promotions with values that are more than the search value in the desired field.
  - **Less than**: Select this operator to find all promotions with values that are less than the search value in the desired field.
  - **Any**: Select this operator to find all promotions with the desired field.
  c. **Search value**: Enter the value that is needed in order to search.
  d. This is optional - One more field - select the **and** or **or** value to add one more field based on the desired search. One more desired field can be added to search in the following cases:
    - Select **and** to find promotions complying with several parameters.
    - Select **or** to find promotions, for example, in two promo groups, but avoiding to make a search twice.

4. This is optional - Apply additional options to the search results in advance. For details, see Filtering Search Results.

5. At the left bottom of the tool, click the **Find** button.

Making Advanced Promotion Search

If you cannot find a promotion you need in the Promotions list, you may try using the promotion reports.

For example, to find a promotion by its department:

1. Open the **Promotions by Tag** report.

2. At the top of the report, go to **Advanced** > **Filters**.

3. In the **Filter by Item Tags** filter, select **Departments**.

4. Select the department included in the promotion you want to search for.

5. Click the **Refresh** button.

> ℹ️ For more information, see Promotions by Tag report.

Filtering Search Results

To filter the search results, at the bottom of the Find and Replace tool, use any of the following options:

- **Select/Deselect All**: Use this option to select or deselect all the promotions in the search results. Do not use it as an additional search option.

- **Items Per Page**: Select the desired number of items that are to show on one page.

- **Current Station**: Select a station for displaying this station's promotions only. Select **All Stations** to display all promotions.

- **Show All Promotions**: Select this option to display all promotions, including the ended

promotions.

Customizing Search Results

To customize the search results in the Find and Replace tool, use the following sections:

- **Sort By**: Click this section and then select the sorting criteria in the first turn.

- **Fields to Show**: Click this section and select the fields for displaying in the search results. Then click **Save Settings**.

Viewing Future Promotions

To view what promotions are set to run in the future:

1. Make sure the **Start Date** and **End Date** columns are displayed in the **Promotions** list. If not—do the following:

   a. Open **Operational Panel**, using the Operational Panel Switcher.

   b. In the left menu, click **Fields To Show**.

   c. Select the **Start Date** and **End Date** check boxes.

   d. Click the **Save Settings** button.
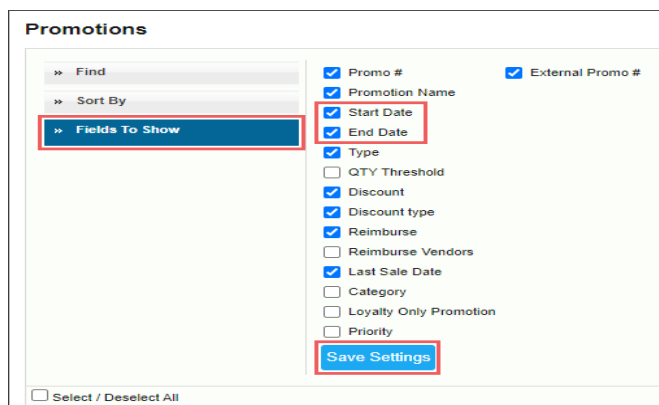
   e. Reload the **Promotions** list.

2. Sort the promotions list by the **Start Date** column in descending order.

Managing Promotions by Location Tags

You can create a promotion by a location tag. As a result, the promotion will be in effect for all locations to which this tag is assigned.

When you manipulate location tags, CStoreOffice® automatically updates settings of promotions created by these tags. To let you easily update the promotions settings, CStoreOffice® provides the following possibilities:

- Updating promotions in bulk when a location tag is assigned to new locations.

- Ending promotions in bulk when a location tag is removed.

Updating Promotions in Bulk

When you assign a location tag to a new location, CStoreOffice® needs to update all promotions created by this tag so that these promotions take effect for the new location. You can update all promotions in bulk or granularly, one by one.

To update promotions, follow the steps:

1. Go to **Settings** > **Tags** > **Locations**.

2. In the tags tree, right-click the necessary tag and select **Set for Stations**.

3. In the left pane of the **Set for Stations** window, select the location to which you want to assign the tag and click the **>** button.

4. Click the **Activate** button.
   Result: CStoreOffice® displays the list of promotions created by this tag and prompts you to update the promotions.

5. In the displayed window, do one of the following:

   o To update all promotions in bulk, in the displayed window, click the **Resave all** button.

   o To update promotions one by one, click each promotion in the displayed list and edit the settings of the promotion.

   Result: The location tag is assigned to the location, and the location is added to the list of promotions created by this tag.
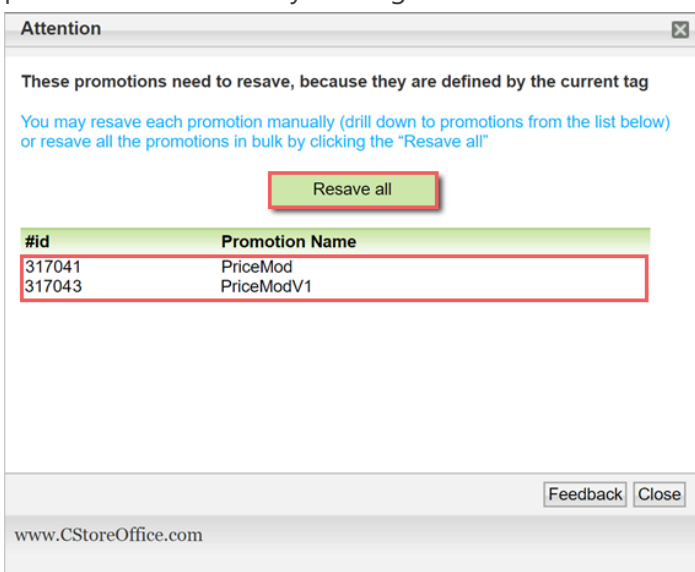
Ending Promotions in Bulk

When you remove a location tag from the tags hierarchy, CStoreOffice® requires that you end all promotions created by this tag.

To end all promotions, follow the steps:

1. In the tags tree, right-click the necessary tag and select **Remove**.
   Result: CStoreOffice® displays the list of promotions created by this tag and prompts you to end the promotions.

2. In the displayed window, do one of the following:

   o To end all promotions in bulk, in the displayed window, click the **End All Promotions** button.

   o To end promotions one by one, click each promotion in the displayed list and edit the settings of the promotion.

Result: The promotions created by the tag that you want to remove are ended, and the tag is removed from the tags tree.
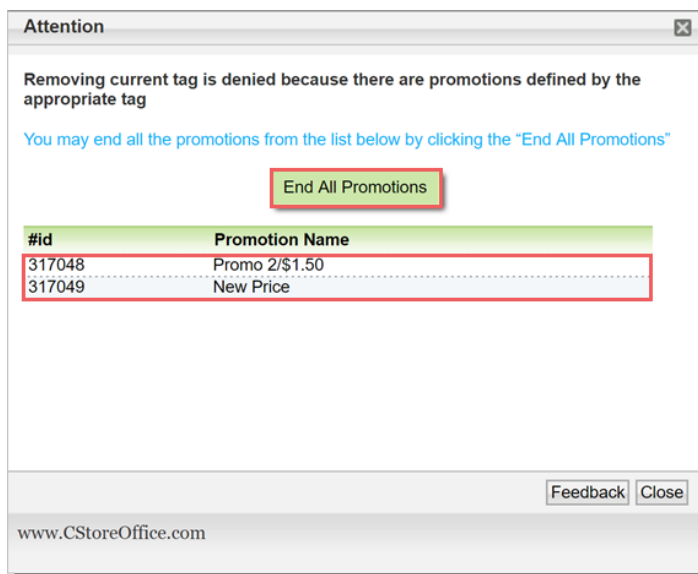
Accepting Promotion Changes Automatically

By default, when you create a new promotion or make changes to an existing promotion in CStoreOffice®, these changes first appear in the Cash Register Updates Manager. To send the promotion changes to the cash register, you need to review and accept them with the Cash Register Updates Manager.

If necessary, you can enable CStoreOffice® to automatically accept promotion changes. In this case, when you create a new promotion or change an existing promotion, the changes will be sent directly to the cash register.

To enable CStoreOffice® to automatically accept promotion changes:

1. In CStoreOffice®, go to **Data Entry** > **Dashboard**.

2. In the **Station Options** section, click **Cash Register**.
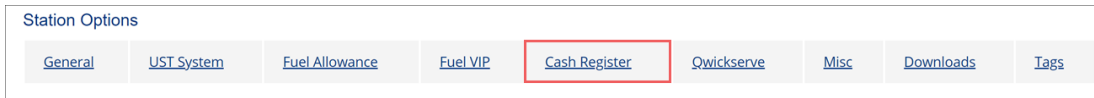
3. In the **Stations** list in the **Station : Options : Cash Register** form, select the location for which you want to configure the auto acceptance settings.

4. In the **Shared Options** section, select the **Accept Price Book changes automatically** check box.

5. At the bottom of the form, click **Save** to save the changes.
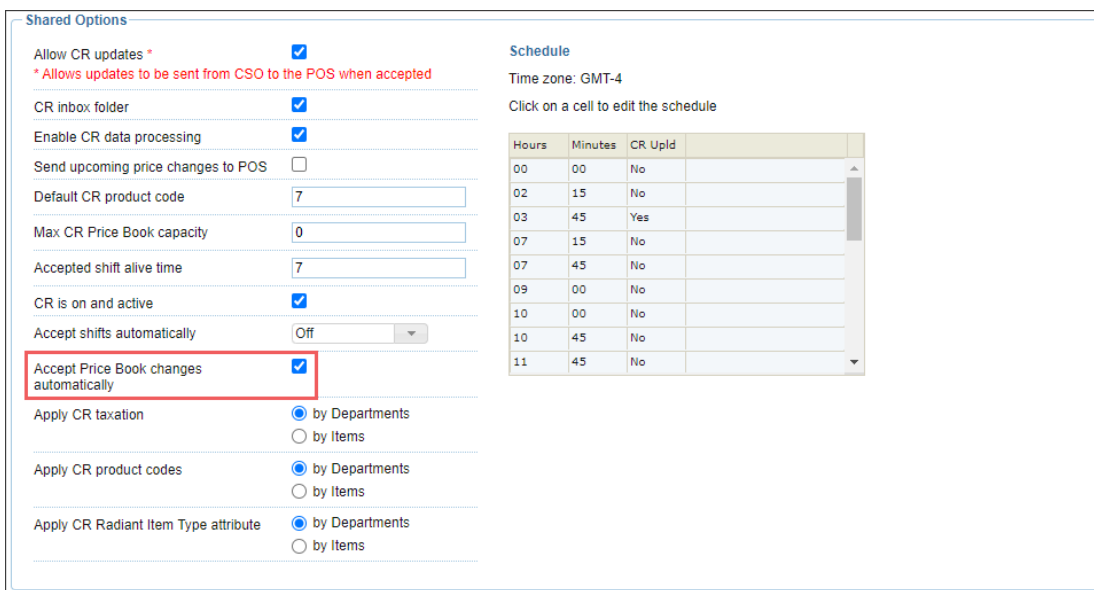
Result: Promotion changes are sent automatically to the cash register , bypassing the Cash Register Updates Manager.

> (i) CStoreOffice® sends promotion updates to cash registers with time intervals not greater than 7 minutes.

Checking Promotion Updates

If you enable the **Price Book Auto-Accept changes** option and make changes to promotions in CStoreOffice®, the system does not display any notifications that the promotions updates have been sent to the cash register. You can check if the promotions have been updated using Cash Register Updates Manager.

To check if promotions have been updated:

1. At the left of the CStoreOffice® home page, click the arrow icon next to **Items Updates**.

2. In the **Items Updates** list, click a location whose data you want to synchronize.
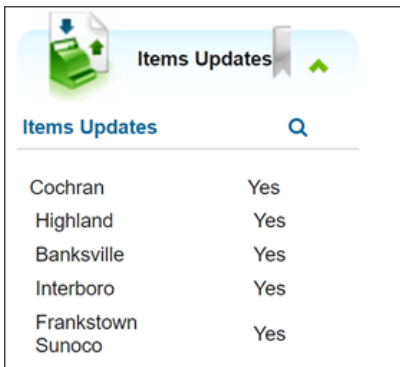
Result: The **Cash Register Updates Manager** form opens.

3. Scroll down to the **Active Promotions** section.

4. Click the **Active Promotions** section to expand it and make sure the updated promotion is available in the list.

Viewing Promotions Reports

The following promotions reports can be viewed in CStoreOffice®:

- List of Promotions Report: This report provides advanced information on the account's promotions.

- Promotion History Report: This report provides the information about changes made to the selected promotion.

- Promotions Report: This report provides information on all promo groups and promotions on the station classified by categories.

- Promotions Acceptance Report: This report provides information on stations active promotions.

- Promotion by Tag Report: This report provides advanced information on the existing promotions for the specified period.

List of Promotions Report

This section describes the specifics of accessing and interpreting the List of Promotions report.

Opening Report

You can open the report in one of the following ways:

- Go to **Reports** > **PB** > **Promotions** > **List of Promotions**.
- Go to **Price Book** > **Promotions** > **Related Information** section > **List of Promotions**.

For more information, see Viewing Reports.

Viewing Report

List of Promotions report provides advanced information on the account's promotions.

The report contains the following information:

- **Promo #**: Promotion ID
- **Name**: Promotion name
- **Type**: Promotion type
- **From**: Promotion start date
- **To**: Promotion last date
- **Status**: Active/Inactive
- **New Cost**: Promotion items cost
- **New Cost Date**: Date of promotion cost setup
- **Old Cost**: Promotion items previous cost
- **Old Cost Date**: Date of promotion previous cost setup

> ♡ To display the **New Cost**, **New Cost Date**, **Old Cost**, **Old Cost Date** fields in the report, select the **Show promotion costs** option at the top of the report and then click the **Refresh** button.

- **Reimb.Vendor**: Reimburse vendors names list

Filtering Report Data

To get the exact information you need, you can apply filters to the report. To set up a filter, select one or more filtering options. Once the filter is set up, at the bottom of the filter section, click the **Refresh** button to display the report data by the filter criteria.

To filter the report results by the item tags, click **Advanced** > **Filter by Item Tags**, select item tags and then click **Refresh**.

Use this option to filter the report data by tags assigned to items. The generated report will contain data only for those items to which the selected tags are assigned.

To select tags by which the report data must be filtered, expand the tags tree and select the check boxes next to the necessary tags. You can filter the report data by root tags and tags of the lower level in the tags hierarchy. You can also create a combined filter by selecting different root and child tags.

> Press **CTRL**, to select several items at a time.
>
> Select the **Show Only** option to view only the information for the selected items, and **Show All Except** to view the information for all the items except the selected ones.

Additional Actions

To reload the form, click **Refresh**.

To print the report, click **Print Version**.

To view the report in the Excel version, click **Convert to Excel**.

To view the report in the PDF version, click **Export to PDF**.

> In case of large amount of data in the report, we recommend you before exporting report data to the Excel or PDF version, make sure the **Show promotion costs** option at the top of the report is not selected.

For more information on additional report features, see Reports.

Promotion History Report

This section describes the specifics of accessing and interpreting the Promotion History report.

Opening the Report

You can open the report from the promotion viewing form:

1. Go to **Price Book** > **Promotions**.

2. In the promotions list select the promotion you need.

3. Click **View**.

4. In the promotion viewing form, click **History**.
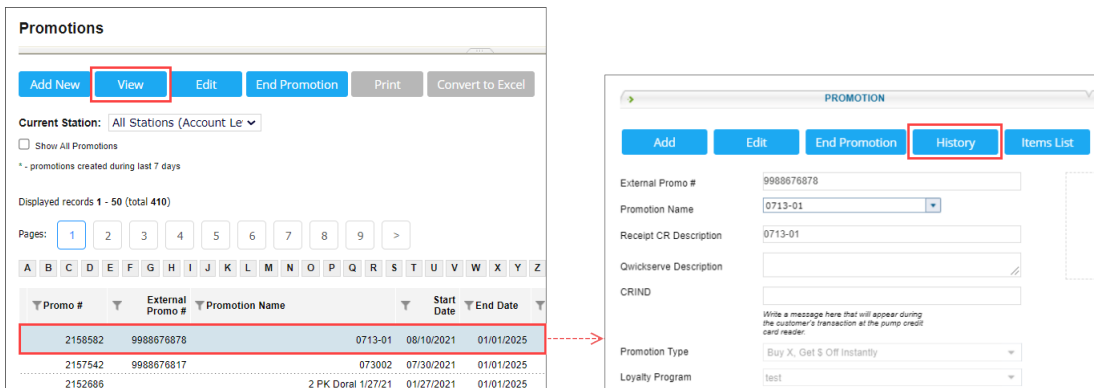
Viewing the Report

The Promotion History report provides the information about all changes made to the selected promotion.

The report contains the following information:

- **Date**: The date and time when the changes were made.
- **User**: The name of the user who made the changes.
- **Changes**: In case the changes are made, you will see the red flag in the relevant section. Hover over this flag to view more details.
  - **Info**
  - **Period**
  - **Type**
  - **Included Set**
  - **Participation Set**
  - **Reimburse**
- **Edit Reason**: The reason for making changes.

For more information on additional report features, see Reports.

Promotions Report

This section describes the specifics of accessing and interpreting the Promotions report.

Opening Report

You can open the report in one of the following ways:

- Go to **Reports** > **PB** > **Promotions** > **Promotions**.
- Go to **Price Book** > **Promotions** > **Related Information** section > **Promotions**.
- Go to **Price Book** > **Items** > search for an item > click **View** > click **Promotions**.

For more information, see Viewing Reports.

Viewing Report

The Promotions report provides information on all promo groups and promotions on the station classified by categories.

The report contains of the following information:

- **Categories**
- **Promo Groups**
- **Promotions**:
  - o **Promotion Name**
  - o **QTY Threshold**
  - o **Discount**
  - o **Discount type**
  - o **Reimburse**
  - o **Start Date**
  - o **End Date**

Additional Actions

To view all promo groups in the category, click this category.

To view all promotions in the promo group, click this promo group.

To view the active promotions only, click **Show Active Only**.

To edit the promotion, in the list of promotions, click the **Edit Promo** button at the right of the promotion.

For more information on additional report features, see Reports.

Promotions Acceptance Report

This section describes the specifics of accessing and interpreting the Promotions Acceptance report.

Opening the Report

You can find the report at **Reports** > **PB** > **Promotions** > **Promotions Acceptance**. For more information, see Viewing Reports.

Viewing the Report

The Promotions Acceptance report provides information on stations active promotions.

Interpreting the Report Data

The Report contains of the following information:

- Promotion name
- Promotion type
- Promotion condition
- Promotion activity time frame

> ⭘   To edit a promotion, click it.

For more information on additional report features, see Reports.

Promotions by Tag Report

This section describes the specifics of accessing and interpreting the Promotions by Tag report.

You can perform the following actions with the report:

- Open the report with default or custom filters.
- View the report's data.
- Filter and sort the report's data.
- Additional actions.

Opening the Promotions by Tag Report

You can open report in either of the following ways:

- Go to **Reports** > **Store** > **Sales** > **Promotions by Tag**.
- Go to **Reports** > **Price Book** > **Promotions** > **Promotions by Tag**.

> ♀ The Promotions by Tag report can be opened at any level: account, company, division, or station. For more information, see Viewing Reports.

Once the report opens, it doesn't display any data as no report filters are applied.

To view the report data, do either of the following:

- Open the report with default filters.
- Open the report with custom filters.

Opening the Report with Default Filters

To generate the report with the default filters, click **Refresh**.

The following default filters will be applied to the report:

- **Period**: One month before the current date.

  > 📄 **For example**
  > If the current date is 31 January 2020, then the report default period starts on 31 December 2019 and ends on 31 January 2020.

- **Filter by Promotions**: All promotions.

Opening the Report with Custom Filters

To generate the report with custom filters:

1. At the top right of the report, click **Advanced**.

2. Select the filters you need. For details, see Filtering and Sorting Report Data.

3. Click **Refresh**.

Viewing the Promotions by Tag Report

The Promotions by Tag report provides advanced information on existing promotions and allows you to keep track of promoted items purchased at your business for a specific period of time.

> 💡 To view this report, set up a filter by stations or station tags, and filter the report data by specific promotions. You can further refine the report by using other filtering options.

The report contains the following information:

- **Promotion Name**: The promotion name. For each promotion, the data is presented in the following formats:
  - **Promo**: Projected amount in which 100% of items included in this promotion are calculated as sold at the promotion price.
  - **Single**: The information about items included into the promotion, but sold separately, not within this promotion.
  - **Blended**: Actual amount of items sold at both promotion and regular / other price. Some of items participating in promotion can be sold at a regular price as well.
- **Sales, $**
- **Rate, %**: The percentage of promo and single sales to total sales. The Rate, % value is rounded to two decimal places and calculated by the following formulas:

o *Rate (promo sales), % = Promo Sales, $ / Total Sales, $ * 100%*

o *Rate (single sales), % = Single Sales, $ / Total Sales, $ * 100%*

- **Units Sold**: Number of units sold during the promotion active period.

> 💡 The total for units sold for closed or inactive promotions includes units sold until the promotion ending date. You can check the promotion ending date in the **Promotion Setup** form > **Time Frame** section. For details, see Promotion Setup form.

- **Net Price Change, $**

- **Net GPM, %**

- **Net Profit, $**

- **Cost Exceptions**

- **Participation, %**

- **Items Included**

Promotions by Tag Report : Greyhound ☆

Filter By Promotions: Sobe Lifewater 20 oz $1.59, Path Water 20.3 oz 2/$5 Jan-Dec 2021, Path Water 25 oz 2/$5.50 Jan-Dec 2021
Period: from 01/01/2020 to 12/31/2020
Filter by Station: Show All except 18740 | 400_Demo
Report date and time: 10/09/2021 06:45:55 PM EDT

Promotion Name		Sales, $	Rate, $	Units Sold	Net Price Change, $	Net GPM, %	Net Profit, $	Cost Exceptions	Participation, %	Items Included
2149717 . Sobe Lifewater 20 oz $1.59	Promo	186.03	97.50	117	(35.10)	37.64	70.03		100.00	5
	Single	4.77	2.50	3		100.00	4.77			
	Blended	190.80		120		39.20	74.80			
Total	Promo	186.03	98	117	(35.10)	37.64	70.03	0		
	Single	4.77	3	3		100.00	4.77			
	Blended	190.80		120		39.20	74.80			

Report ID: 9540

Filtering the Promotions by Tag Report

To get the exact information you need, you can apply filters to the report. To set up a filter, select one or more filtering options. Once the filter is set up, at the bottom of the filter section, click the **Refresh** button to display the report data by the filter criteria.

The report provides the following filtering and sorting options:

- **Date**: Specify the period you are interested in manually using the calendar or use one of the available filtering options, and then click **Refresh** There are the following filtering periods available:

  o **Yesterday**

  o **Current Month**

  o **Current Quarter**

  o **Current Year**

  o **Last Month**

- o **Last Quarter**

- o **Last Year**

- o **Last 12 Months**

- ● **advanced**: Click the **advanced** button, select one several filtering options you want, and then click[**Refresh**. There are the following advanced filtering options available:

  - o **Subtotal By**. Select one of the following subtotal options, if you want to break-down the report results further:

    - ● **Common (Station)**

    - ● **Station Tags**

    - ● **Item Tags**

  - o **Station Included**: Select the stations you want to view the report for.

  - o **Filter by Station Tags**: Use this option to filter the report data by tags assigned to stations. The generated report will contain data only for those stations to which the selected tags are assigned.

    To select tags by which the report data must be filtered, expand the tags tree and select the check boxes next to the necessary tags. You can filter the report data by root tags and tags of the lower level in the tags hierarchy. You can also create a combined filter by selecting different root and child tags.

  - o **Filter by Item Tags**: Use this option to filter the report data by tags assigned to items. The generated report will contain data only for those items to which the selected tags are assigned. To select tags by which the report data must be filtered, expand the tags tree and select the check boxes next to the necessary tags. You can filter the report data by root tags and tags of the lower level in the tags hierarchy. You can also create a combined filter by selecting different root and child tags.

  - o **Filter By Promotions**: Select the promotions you want. For more information, see Filtering the Report's Data by Promotions.

  - o **Sort by**. Select the order of the report columns you want. Select the **Ascending** or **Descending** option for the corresponding type of filtering.

> Press **CTRL** to select several items at a time.
> Select the **Show Only** option to view only the information for the selected items, and **Show All Except** to view the information for all the items except the selected ones.

Filtering the Report's Data by Promotions

To filter the report's data by promotions:

1. Click **Advanced** > **Filter By Promotions**.

2. In the **Promotions** filter, click **Find**.

Result: The Promotions list opens.

3. In the **Promotions** list:

   a. Make sure the **Find** option is selected.

   b. In the **Field** list, select the promotion parameter by which you want to find your promotions in the list.

   c. Select the search operator.

   d. Enter the search value, if any.

   e. Click **Find**.

   Result: All promotions that match the search criteria are displayed in the list.

   f. Select the promotions you want to add to the report's filter.

g. Click the **Add all to List** button.

Result: All promotions found in the **Promotions** list are added to the **Filter By Promotions** filter to the report.

4. In the **Promotions by Tag** report:

a. In the **Filter By Promotion** field, select the promotions by which you want to filter the report's data.

b. Select other filters, if needed.

c. Click **Refresh**.

   Result: The report's data is filtered in accordance with the specified filtering criteria.

Additional Actions

You can perform the following activities with the report:

- To view **Item Sales by Promotion** report, click **Promo** for the promotion in which you are interested.

- To view the **Sales by Items Included in Promotion** report, click **Blended** for the promotion in which you are interested.

- To view the **Net Price Change** report, click the **Net Price Change** column for the promotion in which you are interested.

- To view the **Participation** report, click the **Participation** column for the promotion in which you are interested.

- To view the **Promotion Items List** report, click the **Items Included** column for the promotion in which you are interested.

For more information on additional report features, see Reports.

Annex I. Promotions: Compatible Cash Registers

CStoreOffice® promotions are supported by most cash registers with some limitations listed in the table below:

- Limitations for Regular Promotions
- Limitations for Combo Promotions

To specify if a parameter is supported by a certain cash register type and for a certain promotion type, the following icons are used in the table:

Icon	Description
➕	Parameter is supported.
➖	Parameter is not supported.

> ⓘ Promotions and their parameters not listed in the tables are supported by cash registers without limitations.

Limitations for Regular Promotions

- Limitations for basic parameters of all regular promotions
- Limitations for Price Reduction Promotion
- Limitations for New Price Promotion
- Limitations for Price Modifier Promotion
- Limitations for Mix & Match Promotion
- Limitations for Price Each Mix Promotion
- Limitations for Link Saver Promotion
- Limitations for Coupon Promotion
- Limitations for Scan Data: Outlet Multi Pack Promotion
- Limitations for Scan Data: Account Funded Promotion
- Limitations for Scan Data: Manufacturer Multi Pack Promotion
- Limitations for Scan Data: Manufacturer Buy-Downs Promotion
- Limitations for Scan Data Loyalty Promotion

Limitations for basic parameters of all regular promotions

Cash Register Types	Basic parameters of all regular promotions			
	External Promo #	QwickServe Description	Departments Included	CRIND
SmartPOS	–	–	–	–
Radiant	+	–	–	–
Passport	–	–	–	–
Ruby	–	–	–	–
Sapphire (Deal)	–	–	–	–
Sapphire (NAXML Deal)	–	–	–	–
Commander (NAXML Deal)	–	–	–	–
Nucleus	–	–	–	–
Conexxus	–	–	–	–
ITL v.1.4.5	–	–	+	–
Bulloch	–	–	–	–

Limitations for Price Reduction Promotion

Cash Register Types	Price Reduction	
	Promotion Parameters	Happy Hours
SmartPOS	+	–
Radiant	+	+
Passport	+	–
Ruby	+	–
Sapphire (Deal)	+	–
Sapphire (NAXML Deal)	+	–
Commander (NAXML Deal)	+	–
Nucleus	+	–
Conexxus	+	–
ITL v.1.4.5	+	–
Bulloch	+	–

For more information on how to configure the promotion, see Price Reduction Promotion.

Limitations for New Price Promotion

Cash Register Types	New Price	
	Promotion Parameters	Happy Hours
SmartPOS	➕	−
Radiant	➕	➕
Passport	➕	−
Ruby	➕	−
Sapphire (Deal)	➕	−
Sapphire (NAXML Deal)	➕	−
Commander (NAXML Deal)	➕	−
Nucleus	➕	−
Conexxus	➕	−
ITL v.1.4.5	➕	−
Bulloch	➕	−

ⓘ For more information on how to configure the promotion, see New Price Promotion.

Limitations for Price Modifier Promotion

The Price Modifier promotion's parameters are supported by all cash register types without limitations, except for basic parameters listed in the Limitations for basic parameters of all regular promotions table.

ⓘ For more information on how to configure the promotion, see Price Modifier Promotion.

Limitations for Mix & Match Promotion

Cash Register Types	Mix & Match						
	New Price	Amount	Percent	Happy Hours	and more	Taxation	Priority
SmartPOS	➕	➕	➕	➕ (days only)	➕ (% only)	−	−
Radiant	➕	➕	➕	−	−	−	➕
Passport	➕	➕	➕	−	−	−	−
Ruby	➕	➕	−	−	−	−	−
Sapphire (Deal)	➕	− *	− *	−	−	−	−
Sapphire (NAXML Deal)	➕	➕	➕	−	−	➕	−

Cash Register Types	Mix & Match						
	New Price	Amount	Percent	Happy Hours	and more	Taxation	Priority
Commander (NAXML Deal)	➕	➕	➕	–	–	➕	–
Nucleus	➕	➕	➕	–	–	–	–
Conexxus	➕	➕	➕	➕	–	–	–
ITL v.1.4.5	–	➕	➕	➕	–	–	–
Bulloch	➕	–	–	–	–	–	–

For more information on how to configure the promotion, see Mix & Match Promotion.

Limitations for Price Each Mix Promotion

Cash Register Types	Price Each Mix						
	Promotion Parameters	New Price	Amount	Percent	Happy Hours	Taxation	Priority
SmartPOS	➕	➕	➕	–	➕ (days only)	–	–
Radiant	➕	➕	➕	➕	–	➕	➕
Passport	➕	➕	– !	– !	–	–	–
Ruby	➕	➕	➕	–	–	–	–
Sapphire (Deal)	➕	➕	– *	– !	–	–	–
Sapphire (NAXML Deal)	➕	➕	➕	➕	➕	➕	–
Commander (NAXML Deal)	➕	➕	➕	➕	➕	–	–
Nucleus	➕	➕	➕	➕	–	–	–
Conexxus	➕	➕	➕	➕	➕	–	–
ITL v.1.4.5	➕ (2 groups only)	–	➕	➕	➕	–	–
Bulloch	➕	➕	–	–	–	–	–

!: <ComboPrice> summarizes the retail price without recalculating it.

*: <price> summarizes the price without recalculating it.

ⓘ For more information on how to configure the promotion, see Price Each Mix Promotion.

Limitations for Link Saver Promotion

Cash Register Types	Link Saver						
	Promotion Parameters	New Price	Amount	Percent	Happy Hours	Taxation	Priority
SmartPOS	−	−	−	−	−	−	−
Radiant	⊕	⊕	⊕	⊕	−	⊕	⊕
Passport	−	−	−	−	−	−	−
Ruby	−	−	−	−	−	−	−
Sapphire (Deal)	−	−	−	−	−	−	−
Sapphire (NAXML Deal)	⊕	⊕	⊕	⊕	⊕	−	−
Commander (NAXML Deal)	⊕	⊕	⊕	⊕	⊕	−	−
Nucleus	−	−	−	−	−	−	−
Conexxus	⊕	⊕	⊕	⊕	−	−	−
ITL v.1.4.5	⊕ **	−	⊕	⊕	⊕	−	−
Bulloch	−	−	−	−	−	−	−

> ⚲ ******: The Link Saver promotion is supported by the ITL cash registers only for 2 promo groups: 1 trigger group and 1 discount group.

> ⓘ For more information on how to configure the promotion, see Link Saver Promotion.

Limitations for Coupon Promotion

Coupon promotions are supported only by the Radiant cash registers.

> ⓘ For more information on how to configure the promotion, see Coupon Promotion.

Limitations for Scan Data: Outlet Multi Pack (Mix & Match Amount Only)

Cash Register Types	Scan Data: Outlet Multi Pack (Mix & Match Amount Only)		
	Amount	Happy Hours	Taxation
SmartPOS	⊕	⊕ (days only)	−
Radiant	⊕	−	−
Passport	⊕	−	−
Ruby	⊕	−	−

Cash Register Types	Scan Data: Outlet Multi Pack (Mix & Match Amount Only)		
	Amount	Happy Hours	Taxation
Sapphire (Deal)	– *	–	–
Sapphire (NAXML Deal)	➕	–	➕
Commander (NAXML Deal)	➕	–	➕
Nucleus	➕	–	–
Conexxus	➕	➕	–
ITL v.1.4.5	–	–	–
Bulloch	–	–	–

> 💡 *****: <price> summarizes the price without recalculating it.

> ℹ️ For more information on how to configure the promotion, see Scan Data Promotions.

Limitations for Scan Data: Account Funded (New Price)

Cash Register Types	Scan Data: Account Funded (New Price)	
	Promotion Parameters	Happy Hours
SmartPOS	➕	–
Radiant	➕	➕
Passport	➕	–
Ruby	➕	–
Sapphire (Deal)	➕	–
Sapphire (NAXML Deal)	➕	–
Commander (NAXML Deal)	➕	–
Nucleus	➕	–
Conexxus	➕	–
ITL v.1.4.5	➕	–
Bulloch	➕	–

> ℹ️ For more information on how to configure the promotion, see Scan Data Promotions.

Limitations for Scan Data: Manufacturer Multi Pack (Mix&Match Amount only)

Cash Register Types	Scan Data: Manufacturer Multi Pack (Mix&Match Amount only)				
	Amount	For every	Maximum QTY	Happy Hours	Taxation
SmartPOS	+	+	+	+ (days only)	−
Radiant	+	−	−	−	−
Passport	+	−	−	−	−
Ruby	+	−	−	−	−
Sapphire (Deal)	− *	−	−	−	−
Sapphire (NAXML Deal)	+	+	+	−	+
Commander (NAXML Deal)	+	+	+	−	+
Nucleus	+	−	−	−	−
Conexxus	+	−	−	+	−
ITL v.1.4.5	−	−	−	−	−
Bulloch	−	−	−	−	−

> 💡 *****: <price> summarizes the price without recalculating it.

> ℹ️ For more information on how to configure the promotion, see Scan Data Promotions.

Limitations for Scan Data: Manufacturer Buy-Downs (Price Reduction)

Cash Register Types	Scan Data: Manufacturer Buy-Downs (Price Reduction)	
	Promotion Parameters	Happy Hours
SmartPOS	+	−
Radiant	+	+
Passport	+	−
Ruby	+	−
Sapphire (Deal)	+	−
Sapphire (NAXML Deal)	+	−
Commander (NAXML Deal)	+	−
Nucleus	+	−
Conexxus	+	−
ITL v.1.4.5	+	−
Bulloch	+	−

> (i) For more information on how to configure the promotion, see Scan Data Promotions.

Limitations for Scan Data Loyalty

Cash Register Types	Scan Data Loyalty	
	Promotion Parameters	**Happy Hours**
SmartPOS	➕	➕
Radiant	−	−
Passport	−	−
Ruby	➕ (Ruby2 only)	−
Sapphire (Deal)	−	−
Sapphire (NAXML Deal)	−	−
Commander (NAXML Deal)	−	−
Nucleus	−	−
Conexxus	−	−
ITL v.1.4.5	−	−
Bulloch	−	−

> (i) For more information on how to configure the promotion, see Setting Up Scan Data Loyalty Promotions.

Limitations for Combo Promotions

- Limitations for basic parameters of combo promotions
- Other limitations for combo promotions

Limitations for basic parameters of combo promotions

Cash Register Types	Basic parameters of combo promotions			
	External Promo #	**CRIND**	**Product Code**	**Soft Key Number**
SmartPOS	−	−	−	−
Radiant	➕	−	−	−
Passport	−	−	−	−
Ruby	−	−	➕	➕
Sapphire (Deal)	−	−	−	➕
Sapphire (NAXML Deal)	−	−	−	➕
Commander (NAXML Deal)	−	−	−	➕

Cash Register Types	Basic parameters of combo promotions			
	External Promo #	CRIND	Product Code	Soft Key Number
Nucleus	–	–	–	–
Conexxus	–	–	–	–
Bulloch	–	–	–	–

Other limitations for combo promotions

Cash Register Types	Other limitations for combo promotions					
	New Price	Amount	Percent	Include Fuel	Include Car Wash	Taxation
SmartPOS	✚	✚	✚	–	–	–
Radiant	✚	✚	✚	✚	✚	✚
Passport	✚	– !	– !	–	–	–
Ruby	✚	✚	–	–	–	–
Sapphire (Deal)	–	–	–	–	–	–
Sapphire (NAXML Deal)	✚	✚	✚	–	–	–
Commander (NAXML Deal)	✚	✚	✚	–	–	–
Nucleus	✚	–	–	–	–	–
Conexxus	✚	✚	✚	–	–	–
Bulloch	–	–	–	–	–	–

> ♀ **!** <ComboPrice> summarizes the retail price without recalculating it.

> ⓘ For more information on how to configure the promotion, see Combo Setup Form.