How To Define Coupons and Discounts

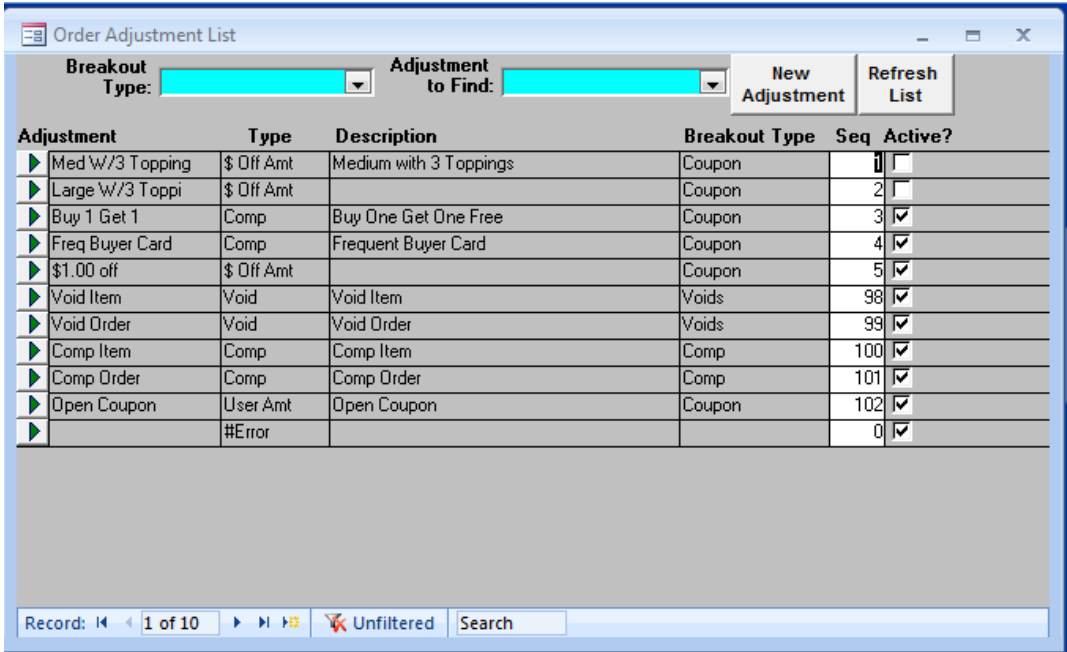Accessing Order Adjustments (Coupons)
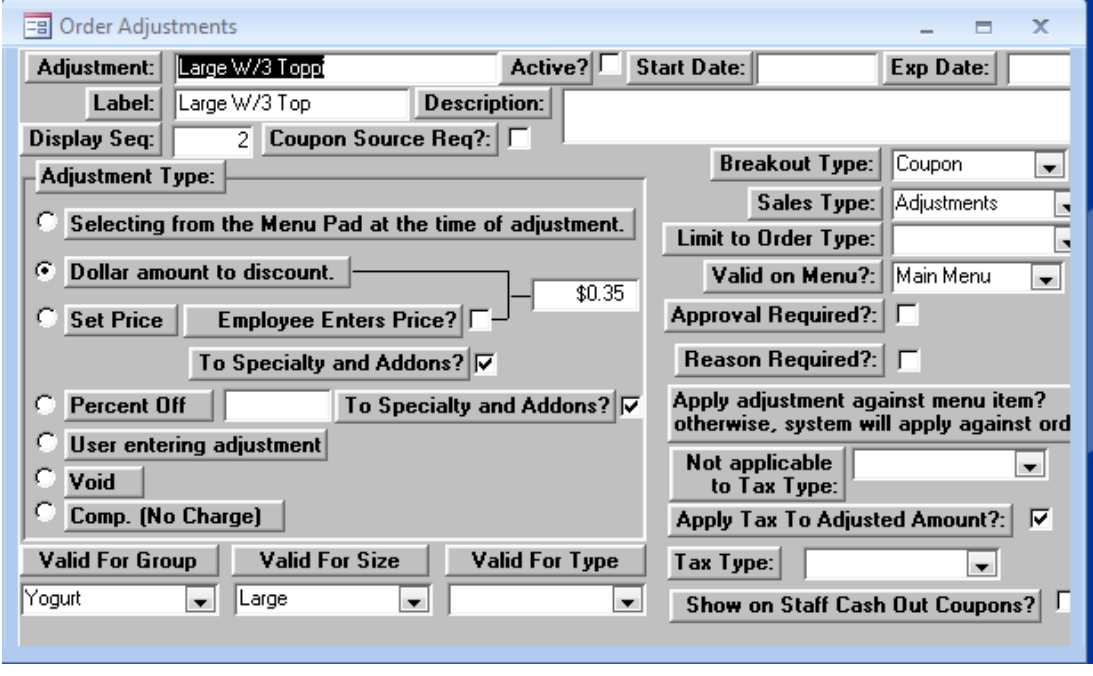1. Open Vital Link POS "Back Office" (login with your password)
2. Select the "General" Drop Down menu
3. Select "Order Adjustments (Coupons)"

The sublevel screen titled New Adjustments provides for entry of new coupons.

You can also edit, activate, and deactivate coupons by selecting an existing entry.

Procedures

Step	Action
1	After log on to the Management Module Back Office, select General ***Order Adjustments (Coupons).*** Result: The Order Adjustments List table appears. Note: Before making entries in this table be sure that the Order Adjustment Breakout Types table has been completed.
2	On the Order Adjustment List table, click the NEW ADJUSTMENT button. Result: The (Order Adjustments) screen appears:

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Order Adjustments   — ☐ ✕

Adjustment:	Large W/3 Toppi

Active? ☐   Start Date: [ ]   Exp Date: [ ]

Label: Large W/3 Top   Description: [ ]

Display Seq: [2]   Coupon Source Req?: ☐

Adjustment Type:

○ Selecting from the Menu Pad at the time of adjustment.

◉ Dollar amount to discount. $0.35

○ Set Price   Employee Enters Price? ☐

To Specialty and Addons? ☑

○ Percent Off [ ]   To Specialty and Addons? ☑

○ User entering adjustment

○ Void

○ Comp. (No Charge)

Breakout Type: Coupon ▾

Sales Type: Adjustments ▾

Limit to Order Type: [ ] ▾

Valid on Menu?: Main Menu ▾

Approval Required?: ☐

Reason Required?: ☐

Apply adjustment against menu item? otherwise, system will apply against ord

Not applicable to Tax Type: [ ] ▾

Apply Tax To Adjusted Amount?: ☑

Valid For Group	Valid For Size	Valid For Type	Tax Type: [ ] ▾
Yogurt ▾	Large ▾	[ ] ▾	Show on Staff Cash Out Coupons? ☐

#	
3	In the Adjustment: field, type the name of the adjustment. (You are limited to 15 characters.) Example: $2 Off Entrees
4	To activate the coupon, click to select the **Active?** checkbox.
5	If the coupon/discount has a specific time period during which it is valid, Enter a start date for the coupon in the **Start Date:** field. Enter an end date for the coupon in the Exp Date: field Use the MM/DD/YYYY format.
6	In the **Label:** field, type the label that you want to see in the Order Adjustment List AND on the Coupon button in live operation.
7	In the Description: field, type a short description of this discount
8	The Display Seq: field determines the order in which your coupons and discounts will appear in the Order Adjustment List AND on the Coupon buttons in live operation.
9	Coupon Source Req: is not implemented in the current release

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10	Reporting and Control Definitions:
	The data on the right hand side of the Coupon definition form is used to define reporting and control rules for the discount being defined. Following is a recap of these options:

Breakout Type: Used on Adjustment Reports to group similar types of discounts, and defined by the operator in the Back Office function using "Order Adjustment Breakout Types". Typical examples would include:

- Comps
- Voids
- Coupons
- Discounts

Sales Type: Used in Sales recaps to show the impact of coupons and discounts. Notes:

- Normally Sales Types such as "coupon", "adjustment", "comp" or "void" might be used for sales reporting
- If you use a Sales Type that is also being used to recap Menu Item sales, Sales Reports may become less predictable in that you are mixing the impact of Items sold and discounts proffered. Some reports may recognize the impact of both, while others may not, thus creating anomalies in totals between reports
- Voids do not show in Sales. Technically, a void is a sale that did not occur (a Comp is a sale that occurred, but payment was not received)

Limit To Order Type: Can be used to offer a specific Coupon/Discount only on specific order types. For example, you may wish to offer a discount on any Pizza (see **Valid for Group** definition below) when it is ordered as a Carry Out item ONLY.

Valid On Menu: If a Coupon/Discount will be used to offer an incentive for a specific Group/Size/Type of item, selecting the menu on which these items appear will result in these drop down boxes listing these categories.

Approval Required: Determines if this Discount/Coupon will require management approval to use (typically set for Voids and Comps).

Reason Required: Determines if the standard "Notes" form will be displayed allowing the operator to select a reason from the list or

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	key in a reason why this discount is occurring (typically used for Voids and Comps). **Apply Adjustment Against Menu Item?:** Determines whether this coupon or discount will apply against the currently highlighted ITEM on the Order Tape or against the entire order (subtotal discount). **Not Applicable To Tax Type:** Used to EXCLUDE Menu Items/Groups that use a specific tax type – this is commonly used in regions where discounts on Liquor (for example) are not allowed. **Apply Tax to Adjusted Amount:** Determines whether the Item/Subtotal should have tax recomputed AFTER the discount, or should not recalculate tax. **Tax Type:** If the discount is a Subtotal Discount, which Tax Type (if multiple types are used) should be discounted by the recalculation of taxes? Do not use this selection if the discount is a Menu Item discount as the Tax Type assigned to the menu item will be used. **Show On Staff Cashout Coupons:** Determines whether this Coupon/Discount will be included on the staff cashout report printed when the "Cash Out" or "Driver Out" function is used.

11	<u>Adjustment Type definitions</u>
	The data in the Framed portion of the form determines the operation of the coupon/discount you are designing as follows:
	
	Void and **Comp:** Require selection of the appropriate checkbox only
	
	Selecting from the Menu Pad at Time of Adjustment: Requires selection of the check box only. This is a SUBTOTAL discount, but will discount the guest check by the amount of the currently highlighted item when it is used.
	
	User Entering Adjustment: Requires selection of the check box only. This discount type will allow the operator to enter a discount amount (to an item or a subtotal based on other components of the form identified).
	
	Dollar Amount to Discount: Check the box and enter the discount AMOUNT in the data entry box provided.
	
	Set Price: Check the box and select from the following:
	
	    • For a Fixed Price – enter the amount in the data entry box provided
	    • For a user defined price at the time of sale – check the Employee Enters Price box and leave the data entry box for

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predefined amount blank
- If the override price should apply to the Specialty AND its associated Addons, check the "To specialty and addons" box.

Percent Off: Check the box and enter the Discount Percentage required in the data entry box provided. If the override price should apply to the Specialty AND its associated Addons, check the "To specialty and addons" box.

Valid for Group/Size/Type: Select the "Valid On Menu" option to use these options. Using the drop down select a Menu Group, then Size and/or Type if desired. These selections will "match" a Coupon/Discount to the highlighted item on an open guest check (e.g. Small Pizza discounts will appear on Coupon Buttons during POS operations IF the item highlighted on the Green open guest check is a small pizza).

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