

Setting Up and Using Coupons

Savvy customers seek out and use coupons and discount codes to save money on their purchases. The Coupon function can therefore play a vital role in attracting buyers to your store. Used properly, you can increase add-on sales, reduce slow-moving items and build strong customer loyalty.

Objectives

- Setting Up Coupons
- Editing and Deleting a Coupon
- Redeeming Coupons
- Viewing Coupon History

Setting Up Coupons

To set up a coupon select *Products > Pricing* and then *Offers and Coupons*.

Tap the *Add* icon.

The *Add New Coupon* page appears. In the *GENERAL* tab, fill in the mandatory fields marked with a red asterisk.

You can use the help icon to be walked through the process step by step. From the *Offer Type* drop-down, select *Coupon*. Enter the code for the coupon here.

For example, you may use NEW20 to give a 20% discount on new customers.

Enter a good description. Enter the start date here and the expiration date here.

You can also identify a grace period. The Grace Period determines how long a coupon remains active *after* the expiration date.

In the *Value* field, enter 20 and select the percentage checkbox.

This field is available only if you select *Coupon* as the offer type. Switch *this* toggle *ON* if this coupon is available only to members of a loyalty program.

Since we are giving a 20% discount to new customers on the total bill, switch *ON* this toggle.

If you are reimbursed by the manufacturer for the coupon, turn *OFF* the toggle to collect tax. You may wish to have a barcode for your coupon. Enable this toggle and enter the barcode *here*. Finally, tap *Save*.

Tap the *Add* icon to add another coupon, or tap *Table View* to return to the previous screen.

Editing and Deleting a Coupon

Sometimes you may need to change a few things to an existing coupon or delete it.

From the *Coupons* page, select the coupon you want to modify.

You can also select multiple coupons to edit. Tap the *Edit* icon.

Make the needed changes and tap *Save*.

You can delete a coupon from the *Edit* screen as well as from the *Viewer* screen using the *Actions* drop-down menu.

Tap *Actions* and then select *Delete Coupon*. Tap *YES* on the confirmation prompt and your coupon is deleted.

Redeeming Coupons

After a coupon is created, it can be redeemed at a POS.

From the main menu, select *Sales* and then *POS*.

After adding items to the transaction, tap the *gear* icon and select *Coupons*. Enter or scan the coupon code and then tap *Add*.

Tap *Add Another* if you wish to add another coupon. A pop-up with the coupon redeemed message appears. You can see the subtotal, discount, and tax information here.

You can also see the total savings here. Select *Make Payment* to complete the transaction.

You will find the discount and the coupon details on the receipt too.

Viewing Coupon History

You will want to understand how offering coupons impact your business. How many customers are using coupons? Which coupons actually help drive sales?

You can get these answers by looking at the coupon's *history* tab.

From the *Coupons* page, check the box next to the coupon whose history you wish to view and tap *Edit*.

Select the *History* tab.

If you want to see how a specific customer has used the coupon, select the customer's name and number from the drop-down.

If you just want to view how this coupon has performed, select the start date here and the end date here. Tap *Search*.

The grid will display the coupon transaction. The transaction statistics for Walk-In and Existing customers are displayed here.

Recap

Increase customer loyalty and sales numbers by strategically using coupons. For more information, refer to the help articles, videos, and guided learning.

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