

Creating sales/promotions/contracts in CounterPoint SQL:

You can use Sales, Promotions & Contracts almost interchangeable. It's more of a way of categorizing types of pricing and defining the order pricing is done. Within these are Groups. Groups are just a way to keep related items together. For example All your 4th of July sale items. Although it would also work if you put each item in your 4th of July sale in its own Group.

Creating Promotions: On the Main tab of the Group code you define the dates the promotion is active.

When Creating Contract pricing: The Main tab allows you to define what customers the pricing applies to. These are pretty straight forward dialogs and will not be covered here.

Next is the Rules section:

The price group you are currently working on.

Change Group Order

If this group is using a Mix-and-match code

Here are all the rules in this group and the current rule you are working on.

Filter tabs – to define what items/customers qualify for the price rule

If using BOGO/Twofer pricing (Buy One Get One)

Only used if using a custom stored SQL procedure.

The whole bottom section (in green) is what makes up the rule line in the top section.

This shows your current filter settings.

Here on the Prices tab is how to calculate the price. (The parameters or contents of the rules).

The rule name your currently working on

Rule description	Items	Customers	Sales	Prices
Std Cust	*** All ***	*** All ***	*** All ***	Min qty Price-1 - 5%
W/S	*** All ***	*** All ***	*** All ***	Min qty Price-1 - 8%
Emp	*** All ***	*** All ***	*** All ***	3 breaks
(new line)	*** All ***	*** All ***	*** All ***	

Min qty	Method	Basis	Amt/pct
0.0000	Discount percent	Price-1	10.0000
5.0000	Discount percent	Price-1	15.0000
10.0000	Markup percent	Average cost	2.0000

CPSQL uses a very specific processing order to determine the price that is charged:

1. Contract pricing
Group Code-The search for a price starts with the first Group Code in Contract pricing and goes through each Rule in the group in order. If a "True" rule is found that price is used. If no Rule is "True" it moves to the next Group Code in Contract pricing and repeats the process until a "True" Rule is found or the Group Codes are exhausted. If no "True" rule is found the search moves to Promo Pricing.
2. Promo pricing -repeats the same procedure as the Contract pricing of going top down through the Group Codes searching for a "True" Rule. If no "True" rule is found the search moves to Specials pricing.
3. Specials pricing -repeats the same procedure as the Promo and Contract pricing. If no "True" Rule is found here, the price charged will be the regular selling price.

To change the order that Groups are searched click the [Set Group Order] button. Then Click the [Move Up] or [Move Down] buttons.

Within each Group, Rules are always searched top down in the order they are listed. To have Rules searched in a different order just move them up or down by clicking the [Move Up] or [Move Down] buttons.

Example of this is if you have rules based on Category/Sub-category. -You want all items in the TOOL category to get 5% off, unless it is in the Sub-category Accessory, then you want to give 50% off.

- Rule 1 Cat = TOOL Price 5% off
- Rule 2 Cat = TOOL and Sub-Cat = ACC Price 50% off

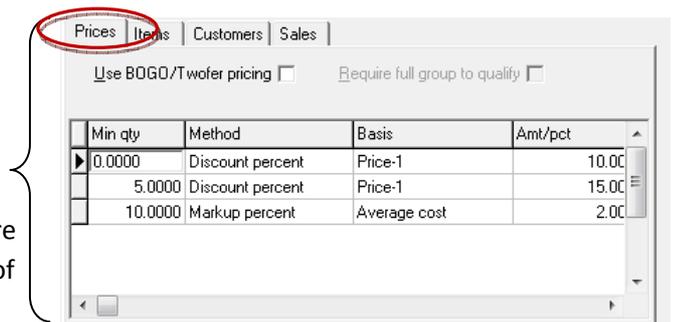
This is not what you wanted. Every item in the TOOL category will get 5% off, including accessories. Because an accessory is in the TOOL category so Rule 1 is true. It never looks at Rule 2. For this to work you need to re- arrange the rules.

- Rule 1 Cat = TOOL and Sub-Cat= ACC Price 50% off
- Rule 2 Cat = TOOL Price 5% off

If the item is a TOOL and ACCESSORY, then Rule 1 is true and is 50% off. If an item is a TOOL but not an ACCESSORY Rule 1 is not true so Rule 2 is used.

In this section I'm going to focus on the Pricing tab.

In this section are the Parameters (contents) of the rule. These are not rules per say. These don't operate with the same restriction of first line that's true is used.



On the next page I'll cover the details of the Prices tab and how it's used to calculate pricing.

Note: For the following examples to work it assumes you checked the box "Use item total item qty for pricing" in / Setup / Point of Sale / Stores / -- Tickets-1 Tab.

Use BOGO/Twofer pricing Require full group to qualify

Min qty	Method	Basis	Amt/pct
*	0.0000	Pick price	Regular price
	Pick price	N/A	
	Fixed price	Regular price	
	Discount percent	Price-1	
	Discount amount	Price-2	
	Markup percent	Price-3	
	Markup amount	Price-4	
	Margin	Price-5	
		Price-6	
		Average cost	
		Standard cost	
		Last cost	

BOGO: When the BOGO/Twofer box is checked, it changes the [Min qty] column to a [Qty] column.

When unchecked: When the qty sold is reached all items sell for the price indicated by the Min qty line.

When checked: The price rule is for a specific ordinal number, rather than a minimum qty.

See below for examples of how this works.

In the Min qty field you enter the quantity required for the line to qualify. 0 means any quantity qualifies. The reason you don't enter 1 is that you may sell fractional quantities (ie ½ lb). The Method will determine if the calculated price will be Pick price (Pick a price from the Basis column), Fixed price (you manually enter the selling price), Discount percent or Discount amount, Markup percent or Markup amount, or on profit margin. The Basis column allows you to select what price/cost the Method column will apply to. In the Amt/pct column you enter the amount or percentage to be used if required by the method chosen.

The simplest type of sale is just by date or customer. You would first set the date range or customer on the Main tab of Sale or Contract pricing. Then on the Price tab set you price.

Min qty	Method	Basis	Amt/pct
0.0000	Fixed price	N/A	9.9900

In this example the price for the item(s) are fixed at \$9.99 regardless of quantity purchased.

This could just as easily have been a discount price.

No minimum qty required

Manually entered price

No Basis used

Selling price

Min qty	Method	Basis	Amt/pct
3.0000	Discount percent	Price-1	5.0000
6.0000	Discount percent	Price-1	8.0000
9.0000	Discount percent	Price-1	10.0000

In this example there is an increasing price break as your purchase quantity increases. (BOGO unchecked)

1-2 = Normal price

3-5 = 5% Off

6-8 = 8% Off

9 or more = 10% off

Qty to qualify

Discount percent will be used

Based on Price-1

Percent used

BOGO/Twofer: Unlike other price rule parameters, each price break you define for a BOGO/twofer price rule determines the price for a specific *ordinal number*, rather than a minimum quantity. BOGO/twofer price breaks are applied in sequential order as each qualifying item is entered or scanned. Thus, a price break with a **Qty** value of **1** will apply to the first qualifying item, a price break with a **Qty** value of **2** will apply to the second, and so forth. When BOGO is checked the 'Min qty' column is changed to 'Qty' to signify this change.

Use BOGO/Twofer pricing Require full group to qualify

Qty	Method	Basis	Amt/pct
▶ 10.0000	Fixed price	N/A	0.1000
50.0000	Fixed price	N/A	0.0900
100.0000	Fixed price	N/A	0.0800
999,999.000...	Fixed price	N/A	0.0700

Here is an example of **Stepped** pricing. You can use BOGO/twofer price rules to define "stepped" pricing that is common in copy shops.

In this example, the first 10 items (e.g., copies) are **.10**, the next 40 are **.09**, the next 50 are **.08**, and any quantity above 100 (up to **999,999,999**) are **.07**. So 100 copies cost \$8.60 not \$8.00

Prices | Items | Customers | Sales

Use BOGO/Twofer pricing Require full group to qualify

Qty	Method	Basis	Amt/pct
1.0000	Fixed price	N/A	0.3400
▶ 2.0000	Fixed price	N/A	0.3300
3.0000	Fixed price	N/A	0.3300

Twofer price breaks

In this example the sale is 3 for \$1. You must buy 3 to receive the sale price. If the item normally sells for 40 cents then if you buy 2 the price will be 80 cents. If you buy 3 the price is \$1. If you purchase 4 the price is a \$1.40. \$1 for the first 3 and 40 cents for the 4th. When you purchase 3 the first item cost 34 cents and the next two cost 33 cents for a total of \$1. This is because 'Require full group to qualify' is checked.

Use BOGO/Twofer pricing Require full group to qualify

Qty	Method	Basis	Amt/pct
▶ 1.0000	Discount percent	Price-1	0.0000
2.0000	Discount percent	Price-1	0.0000
3.0000	Discount percent	Price-1	100.0000

A further example of **BOGO/Twofer** pricing is the buy 3 get one for free.

You can see the first two item sell for a 0% discount (full price), the third sells for 100% discount (free). The fourth would again sell for full price.

Use BOGO/Twofer pricing Require full group to qualify

Qty	Method	Basis	Amt/pct
▶ 1.0000	Fixed price	N/A	0.3400
2.0000	Fixed price	N/A	0.3300
3.0000	Fixed price	N/A	0.3300

If "The Require full group" is unchecked. Then the first item sells for 34 cents, the second and third for 33 cents. The fourth will start back at the beginning and sell for 34 cents.

Use BOGO/Twofer pricing Require full group to qualify

Min qty	Method	Basis	Amt/pct
▶ 1.0000	Fixed price	N/A	0.3400
2.0000	Fixed price	N/A	0.3300
3.0000	Fixed price	N/A	0.3300

If "Use BOGO/Twofer pricing" is unchecked. Then the First item sells for 34 cents. When the second item is sold then both the first and second item sells for 33 cents. In fact for 2 or more sold, all items sell for 33 cents. You don't need the third line of the rule.

The other tabs: Items, Customers, Sales, are simply filters. They won't affect the price, just when the price is applied. These tabs allow you to select which items and customers qualify for the price rule(s) you create.

The Sales tab allows some miscellaneous store, ticket, item qualifiers. For example the sale is only valid on Mondays or the price is only valid for Drawer 2. The Sales tab also lets you apply the price rule based on a ticket profile. This could be used for a sales promotion where if the customer tells you they heard about you on the radio, they qualify for 10% off. Your ticket profile can ask "How did you hear about us." If they answer the "Radio", they get the discount automatically.

Notes on the filter Tabs.

When using filters, the 'English' fields you enter are converted to Microsoft SQL statements. If you remember your high school math class you know that parentheses determine the order of operations. First perform any calculations inside parentheses and work from left to right. In the case of multiple sets of parentheses, always work from the inside out.

And and Or:

If all your lines are joined with 'and' you will find your filter will usually work as expected. But if you join with 'or' you may find the results are not what you expected. Here we will examine this further.

For the following filter...

Customizing view

To view the code generated, right click and select View/Edit Filter Text...

Code generated: (CATEG_COD = 'BUSINESS' and STR_ID = 'MAIN' or BAL 1000)

Notice that other than at the beginning and end there are no parentheses.

This filter will return the following: All **Business** customers who are from **Main** or have a **balance greater than 1000**. The valid records include the **Business** customers from **Main** regardless of their balance, and all other customers regardless of their category whose balance is greater than 1000.

Was this the expected result ?

If what we are really interested in are **Business** customers who are from the store **Main** or **Business** customers who have a **balance greater than 1000** we must indent the last two conditions.

Creating the following code:

(CATEG_COD = 'BUSINESS' and (STR_ID = 'MAIN' or BAL > 1000))

Indenting will put parentheses around the indented lines and change the results.

Here is another example:

You need a filter to only allow items that are in the **GOLF** category that belong to the sub-category of **ACCES** regardless of their price, or other **GOLF** items as long as they have a price-1 **less than 50** dollars regardless of their sub-category.

If you create a filter as shown below:

- Item category** is (exactly) GOLF and
 - Sub-category** is (exactly) ACCES or
 - Price-1** less than 50.0000 and
 - Item category** is (exactly) <?>
- [<Click here to add condition>](#)

(IM_ITEM.CATEG_COD = 'GOLF' and IM_ITEM.SUBCAT_COD = 'ACCES' or IM_ITEM.PRC_1 < 50)

This will allow all items in the GOLF category with a sub-category of ACCES, and all items in other categories with price-1 of less than \$50. But you want to see only GOLF items.

To fix this you will correct the Item Filter so it produces the desired results and has only items in the GOLF category and that are either in the ACCES sub-category or sell for less than 50 dollars.

- Item category** is (exactly) GOLF and
 - Sub-category** is (exactly) ACCES or
 - Price-1** less than 50.0000 and
 - Item category** is (exactly) <?>
- [<Click here to add condition>](#)

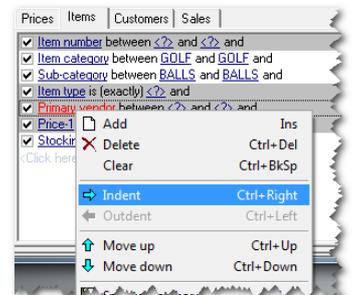
(IM_ITEM.CATEG_COD = 'GOLF' and (IM_ITEM.SUBCAT_COD = 'ACCES' or IM_ITEM.PRC_1 < 50))

This time all items are in the GOLF category and are either in the ACCES sub-category or have Price 1 less than \$50.00.

How do you indent? While customizing the filter, right click the line and click “Indent”.

Mix-and-Match codes:

Group code	3BOXBALLS
Description	3 boxes of golf balls for \$60
Mix-and-match code	SPRING



Mix-and-Match codes allow you to create sales containing different items. For example if you have a sale that is based on quantity. You create a sale on Pop. If you purchase 12 items you get 10% off. If the customer buys 6 Cokes and 6 Pepsi’s and you aren’t using Mix-and-Match the purchase won’t qualify for the 10% off. The customer would need to purchase all Coke or all Pepsi.

If you use Mix-and-Match then any items assigned the same Mix-and-Match code qualify for the promotion. The Mix-and-Match price can be based on any of the following:

- Total quantity
- Total Price-1
- Total weight
- Total cube
- Total item numeric profile

When should you use Contract, Promo or Special pricing:

Sales types:

Contract Prices: Pricing based primarily on customer or customer category.

Promotions (Planned Promotions): are primarily date driven.

Specials: Are sales that are generally not based on dates.

You will frequently find you could create the sale price you need using any one of the above methods. You could have several sales going on all at the same time. Some items may belong to more than one sale. For example you could have a spring sale that will last all month as well as a weekend sale only good for the upcoming weekend. The same item could be in both sales at different prices. This same item may also be in a Contract price for a customer. So the big question is how you control which price a customer gets. Remember Contract pricing takes precedence, then Promotions, then Specials.

In other words when determining which Sales type to use, you need to determine what rule will take precedence. If you find you could just as easily put the item in Promo or Specials, remember if the same item is in both Promos and Specials that Promos will over ride Specials.