

Omni Sub Deals and POS Headers

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Omni Sub Deals and POS Headers

Introduction

This document covers the 2 major new Promotions related features added in 7.18.65. It will aid in the setting up and implementation thereof. It does not cover all the pre-existing discount and promotions functionality.

Although every effort has been made to keep this document up to date, some of the screen examples may not be 100% as per your version of Omni. This is due to the continuous development and improvement of the software.

There may be a discrepancy from time to time and we do apologise for any inconvenience that may arise. This document describes functionality contained in Ver 7.18.65 and later.

Should you feel that this document is not adequate or requires further explanation, please feel free to email support@omniaccounts.co.za

We would love to have some constructive feedback to improve this document. Thank you.

Difference in Functionality Explained

SUB DEALS

Using Customer Deals with  Switch 33 (Min Volume or Multiples Of).
Volume Discount deals can either be for a minimum quantity or else multiples of a specified quantity.

- **If the volume deal is NOT for a specific stock code**, but for any stock code within a Stock Sub-Category, then the volume discount can apply to multiple lines by activating the "Sub Deals" switch ( Switch 232).

Once an invoice has been captured, if this switch is enabled, when you proceed to the document Totals tab, a recalculation will be done across the entire document, checking for volume discounts across stock codes that belong to the same Sub-Category.

- **BONUS FUNCTIONALITY - Switch 232 not required**
If a stock code has been specified for the deal, then each line of the invoice needs to match the conditions to qualify for the deal.
 - For a volume discount with a minimum of 3, the line must have a quantity of 3 or more to pick up the volume deal.
 - For a volume discount for multiples of 3, the line must have a quantity of 3, 6 or 9, for example. If the customer would like to purchase 4, and still get the discount on 3, then you will need to capture a line for 3, and a line for 1.

POS HEADER

It allows you to add customised lines to the document upon custom events, as well as, for example, altering the overall discount based on your own criteria.

For example, to be able to add a free item for purchases over a certain value or add an overall discount for purchases over a certain value or a combination of both.

Queries can be written to include Sub Deal functionality.

Required Omni Switches

SUB DEALS



Switch 24 - Stock Control



Switch 25 - Stock Categories



Switch 64 - Stock Sub-Categories



Switch 106 - Customer Deals



Switch 33 - Stock Volume Discounts



Switch 232 - Sub Deals

POS HEADER

POS bundle



Switch 172 - Custom Sales Document Enquiry

All the above switches (should Sub Deal functionality in the query be required)

Stock Category and Sub-Category Setup

Stock Categories



Switch 24 - Stock Control



Switch 25 - Stock Categories

Menu Access: [Stock | List Stock Categories](#)

This option allows you to set up multiple Stock Categories and then by editing each stock item you can allocate stock to the relevant category. You can then search, report and group data by these categories. The categories can also be used when defining **Customer Deals**. You can also use these Stock Categories in Stock Menu on Customer Documents.

- **Code:** Each Stock category is identified by a four character alphanumeric code.
- **Description:** The description of the category.
- **Active:** Defines whether the category is active or not. If not then it is not available when editing stock records.
- **Show this category on the Stock Menu:** This tick box controls whether the Stock Category will display on the popup Stock Menu on Customer Documents.
- **Sub-Categories:** Select the button to create/view/edit Sub-Categories for Stock Category.
- **Image for Stock Menu:** This allows you to insert an image for the Stock Category which will display on the Stock Menu on Customer Documents. See **Working with Images** in the Omni Help Files for information on how to add an image.

Stock Sub-Categories



Switch 24 - Stock Control



Switch 25 - Stock Categories



Switch 64 - Stock Sub-Categories

Menu Access:

[Stock | List Stock Categories](#) - double-click relevant **Stock Category** - select the **Sub-Categories** button

[Stock | List Stock Sub-Categories](#)

Stock categories can further be divided into Sub-Categories. Stock Sub-Categories are fixed lookup lists - each of which falls under a specific Stock Category.

Sub-Categories should be used for grouping items that are interchangeable. For example, items that are the essentially the same thing, usually the same price, just different flavours or colours.

For example:

- The stock codes for “Moo Brand 1L Full Cream Strawberry Yogurt”, “Moo Brand 1L Full Cream Peach Yogurt” and “Moo Brand 1L Full Cream Blueberry Yogurt” should all fall under the same Stock Sub-Category of “Moo Brand 1L Full Cream Yogurt”.
- The stock codes for “2 min noodles - chicken”, “2 min noodles - beef” and “2 min noodles - mushroom” should all fall under the same Stock Sub-Category of “2 min noodles”.

You can then search, report and group data by these Sub-Categories. The categories can also be used when defining **Customer Deals**. These Stock Sub-Categories also appear on the Stock Menu on Customer Documents.

- **Code:** Each Stock category is identified by a four-character alphanumeric code.
- **Description:** The description of the category.
- **Active:** Defines whether the category is active or not. If not then it is not available when editing stock records.
- **Category:** Defines which Stock Category the Sub-Category falls under.
- **Show this Sub-Category on the Stock Menu:** This tick box controls whether the Stock Sub-Category will display on the popup Stock Menu on Customer Documents.
- **Image for Stock Menu:** This allows you to insert an image for the Stock Sub-Category which will display on the Stock Menu on Customer Documents. See **Working with Images** topic in the Omni Help files for information on how to add an image.

See **Working with Grids** topic in the Omni Help Files for information on how to edit and create records from this screen. By editing each stock item you can allocate stock to the relevant Sub-Category. You can update the Stock Sub-Category by:

- By editing each stock item you can allocate stock to the relevant Sub-Category. Note that when creating a new stock item, the default Sub-Category is picked up from the Stock Options.
- See **Update Selected** topic in the Omni Help files on how to bulk update Stock Categories and Stock Sub-Categories on Stock Items.
- You may also import Stock Sub-Categories. Right Click on the grid and choose the Import option. See **Import Stock Sub-Categories** topic in the Omni Help files for more details.

Sub Deal Example

NOTE : More specific deals override the less specific deals.

For a category rather than a code

Uses Switch 33 - Stock Volume Discounts and Switch 232 - Sub Deals

Buy any 2 min noodles (3 for R15.00). The Chicken, Beef and Cheese would be different stock codes, but the special must still get picked up.

Edit Customer Deal - 1

Branch
Warehouse: Any

Customer
Category: Any
Account: Any
Region: Any
Branch: Any

Stock
Category: PSTA Pasta
Sub-Category: 2MIN 2 min noodles
Item: Any
Multiples Of: 3

Dates
From: 2019/03/12 To: 2019/03/12

Deal
Deal: Inclusive Price 15.00 ZAR per 3
Discount Percent: 0% Active
Promotion: March 2 min Noodle Promotion
Narrative:

OK Cancel

Tax Invoice - New

Customer: BO01 HO Botha Contractors Outstanding

1 Customer Details 2 Document Details 3 Lines 4 Totals 5 Receipt

Stock Code	Description	Stock Category Description	Stock Sub-Category Description	Quantity	Unit Price (Excl)	Ext. Price (Excl)	Ext. Price (Ind)	Deal ID	Deal Narrative
NOOD1	2 min noodles - Chicken	Pasta	2 min noodles	1	6.00	6.00	6.90	-1	Selling Price: 1
NOOD2	2 min noodles - Beef	Pasta	2 min noodles	1	6.00	6.00	6.90	-1	Selling Price: 1
NOOD3	2 min noodles - Cheese	Pasta	2 min noodles	1	6.00	6.00	6.90	-1	Selling Price: 1
				3 Lines	3	18.00	20.70		

Add Stock.. Non Stock.. Comment.. Pure VAT.. Edit Click here then scan bar code

<< Back Next >> Invoice Abandon

Move to Totals tab and back to see the effect.

Tip: Ensure you have the column Deal ID on your grid so you can see the Deal Number (-1 means no deal in effect).

The screenshot shows a 'Tax Invoice - New' window with the following data:

Stock Code	Description	Stock Category Description	Stock Sub-Category Description	Quantity	Unit Price (Excl)	Ext. Price (Excl)	Ext. Price (Incl)	Deal ID	Deal Narrative
NOOD1	2 min noodles - Chicken	Pasta	2 min noodles	1	4.3467	4.35	5.00	1	3 for R.15 2 min noodles
NOOD2	2 min noodles - Beef	Pasta	2 min noodles	1	4.3467	4.35	5.00	1	3 for R.15 2 min noodles
NOOD3	2 min noodles - Cheese	Pasta	2 min noodles	1	4.3467	4.35	5.00	1	3 for R.15 2 min noodles

Summary: 3 Lines, 3, 13.05, 15.00



Note that if you have a quantity higher than required by the deal (5 in this case), by moving to the Totals tab and back, you will see that two lines will be created for the stock code. One with the deal price and quantity and another with the balance of the stock items at the normal price. See example below:

The screenshot shows a 'Tax Invoice - New' window with the following data:

Stock Code	Description	Stock Category Description	Stock Sub-Category Description	Quantity	Unit Price (Excl)	Ext. Price (Excl)	Ext. Price (Incl)	Deal ID	Deal Narrative
NOOD1	2 min noodles - Chicken	Pasta	2 min noodles	1	4.3467	4.35	5.00	1	3 for R.15 2 min noodles
NOOD2	2 min noodles - Beef	Pasta	2 min noodles	1	4.3467	4.35	5.00	1	3 for R.15 2 min noodles
NOOD3	2 min noodles - Cheese	Pasta	2 min noodles	1	4.3467	4.35	5.00	1	3 for R.15 2 min noodles
NOOD4	Vermicelli 80g	Pasta	2 min noodles	3	4.3467	13.04	15.00	1	3 for R.15 2 min noodles
NOOD4	Vermicelli 80g	Pasta	2 min noodles	2	7.50	15.00	17.25	-1	Selling Price: 1

Summary: 5 Lines, 8, 41.09, 47.25



There may be rounding issues on Sub Deals which are unfortunately unavoidable. So be aware that if you *decide* to make your special 3 for R100, then that is going to work out at R33.333333333333 and you are going to end up with a total working back at R99.99 for 3, instead of R100. Carefully consider what the unit price will be, should the deal be split into 3 separate lines.

Further clarification:

Anatomy of a "Buy X qty of any flavour of Y for R price" type deal. SF232

Category Description : Dry Goods

Sub-Category Description : Maggie 2 Minute Noodles			
CK1A	Maggie 2 Minute Noodles - Beef	10	6.99
001CNZZ	Maggie 2 Minute Noodles - Cheese	695	6.99
002CN	Maggie 2 Minute Noodles - Chicken	101	6.99

Deal Configuration:
 Deal: Inclusive Price 34.95 ZAR per 5
 Discount Value: 4.95
 Promotion: Winter Warmers
 Narrative: Buy 5 for R30 - you save 4.95!

Promotions Analysis Page 1

Promotion Name	Value (Excl) Before Discount	Value (Excl) After Discount	Gross Profit	Gross Profit %
Winter Warmers	176 504.94	191 387.68	101 329.91	52.945%
World Cup	13.90	78.28	18.28	23.332%
Back to School	(236.10)	0.00	0.00	0%
	176 282.74	191 465.94	101 348.17	52.933%

BONUS FUNCTIONALITY

Example 1 - Buy 4 for the price of 3

Uses Switch 33 - Stock Volume Discounts only.

Although not strictly a Sub Deal, this example deals with how to structure what used to be known as a BOGOF deal. Original price of stock item is R30 each. What is really happening is that each item is being sold for R22.50 each. The Sales Analysis report should be able to link the discount to the relevant stock item.

The screenshot shows the 'Edit Customer Deal - 3' window with the following configuration:

- Branch:** Warehouse: Any
- Customer:** Category: Any, Account: Any, Region: Any, Branch: Any
- Stock:** Category: TOL (Tools - Other), Sub-Category: BRS (Brushes), Item: BRS0001 (LARGE PAINT BRUSH), Multiples Of: 4 EA
- Dates:** From: 2019/03/15, To: 2019/03/15
- Deal:** Deal: Inclusive Price, Price: 90.00 ZAR, per 4 EA, Discount Value: 0.00, Active: checked, Promotion: Black Friday, Narrative: Buy 4 brushes for the price of 3

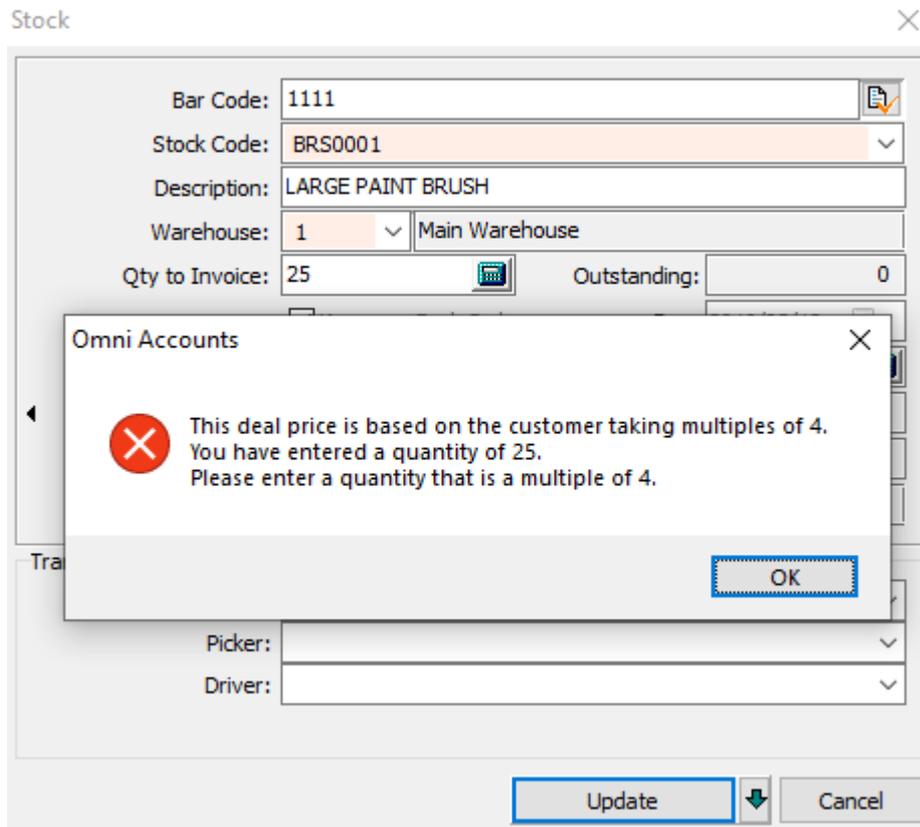
A red box highlights the '90.00' price field with the text 'Selling Price for 3 Items' and an arrow pointing to it.

The screenshot shows the 'Tax Invoice - New' window with the following details:

- Customer:** B001, HO, Botha Contractors, Outstanding
- Table:**

Stock Code	Description	Stock Category Description	Stock Sub-Category Description	Quantity	Unit Price (Incl)	Ext. Price (Excl)	Ext. Price (Incl)	Deal ID	Deal Narrative
BRS0001	LARGE PAINT BRUSH	Tools - Other	Brushes	24	22.50	469.57	540.00	3	Buy 4 brushes for the price of 3
1 Lines				24		469.57	540.00		
- Buttons:** Add Stock.., Non Stock.., Comment.., Pure VAT.., Edit, Click here then scan bar code, << Back, Next >>, Invoice, Abandon

Note that only multiples of the item as per the deal may be sold, else the following error occurs:



Example 2 - Buy 3 for Rx

Uses Switch 33 - Stock Volume Discounts only

Single price R6.90 incl VAT. Deal : buy 5 for R25. This is similar to the above, but they are not getting the 3rd item free, just all 5 at a price lower than the regular price. Usually, this shows on the shelf as “save Rxx”.

Edit Customer Deal - 2

Branch
Warehouse: Any

Customer
Category: Any
Account: Any
Region: Any
Branch: Any

Stock
Category: PSTA Pasta
Sub-Category: 2MIN 2 min noodles
Item: NOOD1 2 min noodle
Multiples Of: 5 EA

Dates
From: 2019/03/15 To: 2019/03/15

Deal
Deal: Inclusive Price 25.00 ZAR per 5 EA
Discount Percent: 0% Active
Promotion: End of Range
Narrative: 5 for R25 2 min noodles - Chic

OK Cancel

Tax Invoice - New

Customer: B001 HO Botha Contractors Outstanding

1 Customer Details 2 Document Details 3 Lines 4 Totals 5 Receipt

Stock Code	Description	Stock Category Description	Stock Sub-Category Description	Quantity	Unit Price (Incl)	Ext. Price (Excl)	Ext. Discount Value	Ext. Price (Incl)	Deal ID	Deal Narrative
NOOD1	2 min noodles - Chicken	Pasta	2 min noodles	5	5.00	21.74	0.00	25.00	2	5 for R25 2 min noodles - Chic

1 Lines 5 21.74 0.00 25.00

Add Stock.. Non Stock.. Comment.. Pure VAT.. Edit Click here then scan bar code

<< Back Next >> Invoice Abandon

OR the same deal can be structured as follows:

Edit Customer Deal - 2

Branch
Warehouse: Any

Customer
Category: Any
Account: Any
Region: Any
Branch: Any

Stock
Category: PSTA Pasta
Sub-Category: 2MIN 2 min noodles
Item: NOOD1 2 min noodles - Chicken
Multiples Of: 5 EA

Dates
From: 2019/03/15 To: 2019/03/15

Deal
Deal: Inclusive Price 6.90 ZAR per 1 EA
Discount Value: 1.90 Active
Promotion: End of Range
Narrative: 5 for R25 2 min noodles - Chic

OK Cancel

Tax Invoice - New

Customer: B001 HO Botha Contractors Outstanding

1 Customer Details 2 Document Details 3 Lines 4 Totals 5 Receipt

Stock Code	Description	Stock Category Description	Stock Sub-Category Description	Quantity	Unit Price (Ind)	Ext. Price (Excl)	Ext. Discount Value	Ext. Price (Incl)	Deal ID	Deal Narrative
NOOD1	2 min noodles - Chicken	Pasta	2 min noodles	5	6.90	21.74	9.50	25.00	2	5 for R25 2 min noodles - Chic
1 Lines				5		21.74	9.50	25.00		

Add Stock.. Non Stock.. Comment.. Pure VAT.. Edit Click here then scan bar code

<< Back Next >> Invoice Abandon

POS Header Examples



With Switch 172 - Custom Sales Document Enquiry, you can write (or have a FastReports expert write) a customised POS Header to influence your POS invoice in many ways. It allows you to add customised lines to the document upon custom events, as well as, for example, altering the overall discount based on your own criteria.

Example 1 - To be able to add a free item for purchases over a certain value.

Welcome to Omni Hardware Shop (CK123456789)
 Customer:
 VAT Reg No:
 Sales Rep: House Sales

TOTAL 0.00
 Spend R1000 or more, and get a free gift

POS Tax Invoice - New

Welcome to Omni Hardware Shop (CK123456789)
 Customer: Cash Sales
 VAT Reg No:
 Sales Rep: House Sales

TOTAL 1449.00
 You get a free 440ml Coke!

Stock Code	Description	Quantity	Measure	Unit Price (Incl)	Discount	Ext. Price (Incl)	Ext. Discount Value
EXT0002	5 METRE EXTENSION CORD	15	EA	96.60	0%	1 449.00	0.00
COKE002	Coke Cola 440ml	1	EA	17.25	0%	17.25	0.00
	Free 440ml Coke	-1	EA	17.25	0%	(17.25)	0.00

3 Lines 15 1 449.00 0.00

Customer (F6) Search (F2) Void (F8) Click here then scan bar code

Proceed (F3) Abandon (Esc)

Example 2 - Add an overall discount for purchases over a certain value.

POS Tax Invoice - New

Welcome to Omni Hardware Shop (CK123456789)
 Customer: Cash Sales
 VAT Reg No:
 Sales Rep: House Sales

TOTAL 6423.90
 You get a 5% discount!

Stock Code	Description	Quantity	Measure	Unit Price (Incl)	Discount	Ext. Price (Incl)	Ext. Discount Value
EXT0002	5 METRE EXTENSION CORD	70	EA	96.60	0%	6 762.00	0.00

1 Lines 70 6 762.00 0.00

Customer (F6) Search (F2) Void (F8) Click here then scan bar code

Proceed (F3) Abandon (Esc)

Example 3 - A combination of Example 1 and 2.



Setup :



Code:

```

var
// StatusMessage: string; use SetTempValue else this gets cleared every
time the header refreshes
  LineValue: currency;
begin
  //Example of adding a line
  if (<Document_Information.'LocalInclusiveValueAfterDiscount'> >= 1000)
and (GetTempValue('FreebieAdded', 'N') <> 'Y') then
  begin
    SetTempValue('FreebieAdded', 'Y');
    SetTempValue('StatusMessage', 'You get a free 2L Coke!'); //could
use ShowMessage() but popups in POS not a good idea, as cashier doesn't see
them, and carries on scanning, not seeing input is blocked
    //AddDocumentLine() Works the same way as CSV imports. The total
value added is returned. Field names must match the column headings
    LineValue := AddDocumentLine('Stock Code', 'COKE002', false);
  
```

```

        AddDocumentLine('Stock Code,Description,Selling
Price,Quantity,Revenue Acc Code', ',Free 2L
Coke,'+FloatToStr(LineValue)+',-1,305000', false);
        //AddDocumentLine('Stock Code,Description,Selling
Price,Quantity,Revenue Acc Code', ',Free 2L
Coke,'+FloatToStr(LineValue)+',-1,305000', false);
    end
    else if (<Document_Information."LocalInclusiveValueAfterDiscount"> <
1000) and (GetTempValue('FreebieAdded', 'N') = 'Y') then
    begin
        SetTempValue('FreebieAdded', 'N');
        SetTempValue('StatusMessage', 'Sorry, you don''t get a free 2L Coke
any more');
        //AddDocumentLine() Works the same way as CSV imports. The total
value added is returned. Field names must match the column headings
        LineValue := AddDocumentLine('Stock Code,Quantity', 'COKE002,-1',
false);
        AddDocumentLine('Stock Code,Description,Selling
Price,Quantity,Revenue Acc Code', ',Free 2L Coke,'+FloatToStr(-
LineValue)+' ,1,305000', false);
    end
    //Example of changing the overall discount
    else //made an else, as the above will trigger a refresh, so this will
get done on the second refresh
    if (<Document_Information."LocalInclusiveValueAfterDiscount"> >= 5000)
and (GetTempValue('OverallDiscountChanged', 'N') <> 'Y') then
    begin
        SetTempValue('OverallDiscountChanged', 'Y');
        SetTempValue('StatusMessage', 'You get a 5% discount!'); //could use
ShowMessage() but popups in POS not a good idea, as cashier doesn't see
them, and carries on scanning, not seeing input is blocked
        SetOverallDiscountCode('RT1');
    end
    else if (<Document_Information."LocalInclusiveValueAfterDiscount"> <
(0.95*5000)) and (GetTempValue('OverallDiscountChanged', 'N') = 'Y') then
    begin
        SetTempValue('OverallDiscountChanged', 'N');
        SetTempValue('StatusMessage', 'Sorry, you don''t get a 5% discount
anymore'); //could use ShowMessage() but popups in POS not a good idea, as
cashier doesn't see them, and carries on scanning, not seeing input is
blocked
        SetOverallDiscountCode(''); //revert to default
    end;
end.

```

This is just a small sample of what can be done. Please contact **Omni Support** if you would like more information.

Reporting

Ensure a description like “Spring Special”, or “Rugby Special”, etc is entered in the **Promotion** field on the Customer Sub Deal. This can then be pulled in on a sales analysis report, so you can see GP/Turnover etc per promotion.

Omni Hardware Shop (CK123456789)
Sales Analysis
 Customer Sales Analysis

*From Document Date: First Day of Current Period (2019/03/01)
 To Document Date: Last Day of Current Period (2019/03/31)
 Expand to Show Detail: Yes
 Include Documents with No Lines: No
 Include Invoices: Yes
 Include POS Invoices: Yes
 Include Journal Invoices: Yes
 Include Credit Notes: Yes
 Include POS Credit Notes: Yes
 Include Journal Credits: Yes*

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Document Date	Customer Name	Document Type	Line Item Description	Quantity	Value (Excl) After Discount	Gross Profit	Gross Profit %
Black Friday							
2019/03/12	Botha Contractors	Invoice	LARGE PAINT BRUSH	24	489.57	145.57	31.001%
Black Friday Totals:				24	489.57	145.57	31.001%
End of Range							
2019/03/12	Botha Contractors	Invoice	2 min noodles - Chicken	5	25.00	12.50	50%
End of Range Totals:				5	25.00	12.50	50%
Grand Totals:				29	494.57	158.07	31.961%

Deal Troubleshooting

On the sales order, sales invoice, customise and pull in Deal ID, Deal Narrative, and if you use Sub Deals (SF232), the Deal Group No. This will allow you to see exactly which deal the price came from.

If you are unsure why a particular deal ID was picked up, edit that line, and then double-click on the Selling Price field. That will list all deals for that customer for that item.

If there is more than one deal, sort by the column called "Preference Index". The deal with the highest preference index is the one that will be used.

From here, you can also click the binoculars, and change the filters, for example the **Minimum Quantity**.

When troubleshooting SF232, be sure to check what Deal ID is in use BEFORE you click next. If it already has an unexpected deal at that point, then the problem is possibly not with the complicated SF232 check at all.

Always show BEFORE and AFTER when reporting SF232 problems.