BUZ Customer Discounts

Adding Customer Discounts

This feature allows Customers or Customer Groups to have Customer Discounts that only apply to them
If you are a retailer and don't have multiple customer groups you can still apply discounts for the 1 group. We have customers using this feature to setup their marketing campaigns

Step 1: Add customer discount groups

Settings-> Sales settings-> Import/Export Sales Settings

Start by downloading our sales settings layout XLSX, Discount groups.

In this spreadsheet you will add your discount groups
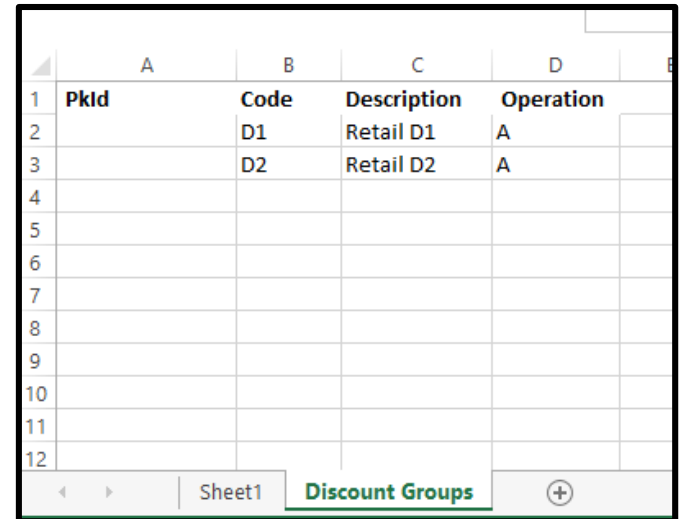Examples;
G1 - 10%
G2 - 15%
G3 - 20%
or
Retail D1
Retail D2

	A	B	C	D
1	PkId	Code	Description	Operation
2		D1	Retail D1	A
3		D2	Retail D2	A
4				
5				
6				
7				
8				
9				
10				
11				
12				

Sheet1   **Discount Groups**   ⊕

NB: Code & Description are required, including the operation (A)
Follow the steps 1 through to 4 under your Sales settings

Adding Customer Discounts

Step 2: Add your Inventory discount groups

These can be setup either for each product (Inv group), **or** you might want these to be setup for each fabric?
Settings-> Inv settings-> Import/Export Inventory settings

Start by downloading our sales settings layout XLSX, "Inventory Discount groups"
In this spreadsheet you will add your Inventory discount groups

	A	B	C	D
1	PkId	Code	Description	Operation
2		CUR-AVA	Curtain Fabric Ava	A
3		CUR-IVY	Curtain Fabric Ivy	A
4		ROLL-CAVE	Roller Fabric Cave	A
5				

NB: Code & Description are required, including the operation (A)

Follow the steps 1 through to 4 in your Inventory settings

Adding Customer Discounts

Step 3: Add your discounts
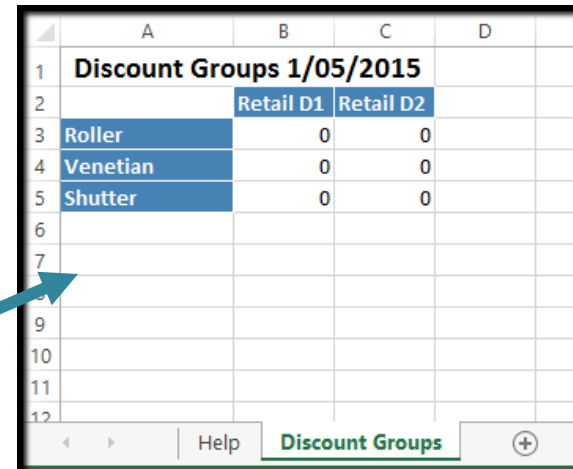*Settings-> Inv settings-> Discount groups > Import/Export*

Download current layouts

This spreadsheet will display the customer groups horizontally
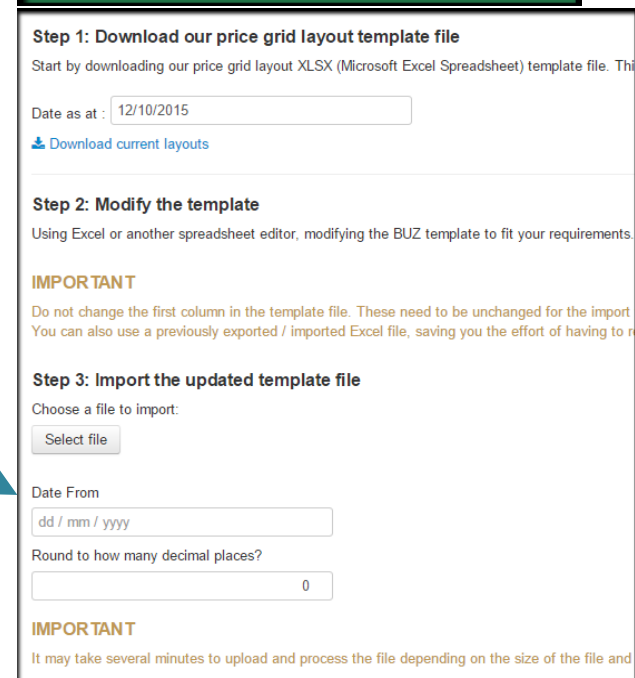And the inventory discount groups vertically on the page

NB: Enter your discounts in %

Follow the steps 1 through to 3 in Discount groups

The import date "Date From" is important!
Here you select the date these discounts become effective

	A	B	C	D
1	**Discount Groups 1/05/2015**			
2		Retail D1	Retail D2	
3	**Roller**	0	0	
4	**Venetian**	0	0	
5	**Shutter**	0	0	
6				
7				
9				
10				
11				
12				

Help **Discount Groups** ⊕

Step 1: Download our price grid layout template file

Start by downloading our price grid layout XLSX (Microsoft Excel Spreadsheet) template file. Thi

Date as at : 12/10/2015

⬇ Download current layouts

Step 2: Modify the template

Using Excel or another spreadsheet editor, modifying the BUZ template to fit your requirements.

IMPORTANT

Do not change the first column in the template file. These need to be unchanged for the import
You can also use a previously exported / imported Excel file, saving you the effort of having to r

Step 3: Import the updated template file

Choose a file to import:

Select file

Date From

dd / mm / yyyy

Round to how many decimal places?

0

IMPORTANT

It may take several minutes to upload and process the file depending on the size of the file and

Adding Customer Discounts

Step 4: Attaching your discounts to Customer groups or customer Cards & Inv items

Once you have setup your groups and discounts you can now attached your discounts to your customer groups and inventory items.

1. Attach to customer group

Contacts-> Customers-> Groups

In each customer group there is "customer discounts group" select
The correct discount group here

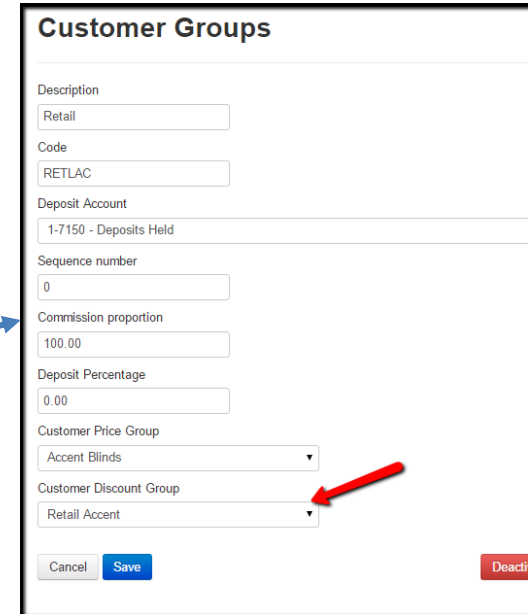**OR**

Attach to customer card

Contacts-> Customers

Select customer card, in each customer card you can attached
Discount group

AND

2. Attach to inventory item

Settings-> Inventory items

Each Inventory item can be attached to a
"Inv discount group" select your correct Inv discount
group here.

Customer Groups

Description
Retail

Code
RETLAC

Deposit Account
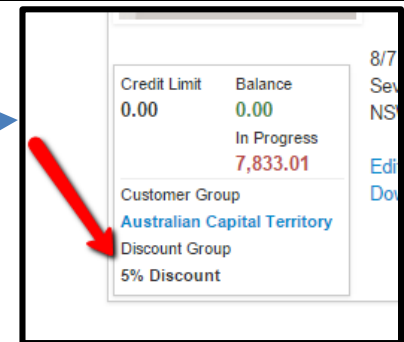1-7150 - Deposits Held

Sequence number
0

Commission proportion
100.00

Deposit Percentage
0.00

Customer Price Group
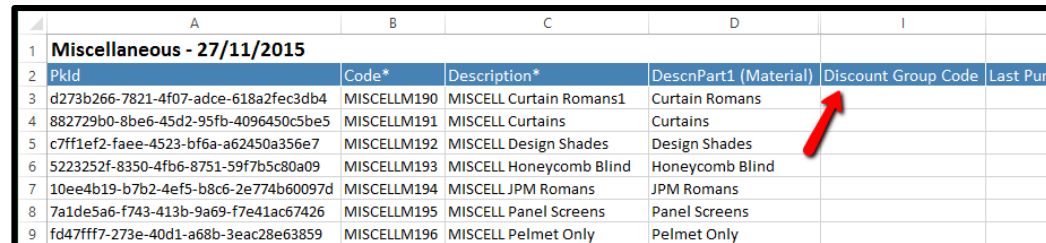Accent Blinds

Customer Discount Group
Retail Accent

Cancel   Save   Deactiv

Credit Limit   Balance   8/7
0.00   0.00   Sev
               In Progress NS
               7,833.01   Edi
Customer Group   Do
Australian Capital Territory
Discount Group
5% Discount

Miscellaneous - 27/11/2015

	A	B	C	D	I
1	Miscellaneous - 27/11/2015				
2	PkId	Code*	Description*	DescnPart1 (Material)	Discount Group Code	Last Purc
3	d273b266-7821-4f07-adce-618a2fec3db4	MISCELLM190	MISCELL Curtain Romans1	Curtain Romans	
4	882729b0-8be6-45d2-95fb-4096450c5be5	MISCELLM191	MISCELL Curtains	Curtains	
5	c7ff1ef2-faee-4523-bf6a-a62450a356e7	MISCELLM192	MISCELL Design Shades	Design Shades	
6	5223252f-8350-4fb6-8751-59f7b5c80a09	MISCELLM193	MISCELL Honeycomb Blind	Honeycomb Blind	
7	10ee4b19-b7b2-4ef5-b8c6-2e774b60097d	MISCELLM194	MISCELL JPM Romans	JPM Romans	
8	7a1de5a6-f743-413b-9a69-f7e41ac67426	MISCELLM195	MISCELL Panel Screens	Panel Screens	
9	fd47fff7-273e-40d1-a68b-3eac28e63859	MISCELLM196	MISCELL Pelmet Only	Pelmet Only	

Adding Customer Discounts

Once the discounts have been setup and attached to your customers/customer groups/Inv items the discount will be added to the quote as of the "date from" (effective date)

These discounts will appear in the "Discount" column on the quote summary & can appear on your document templates if you wish.

If you cant find what your looking for in the help documentation let us know!

We will point you in the right direction or get something added to the documentation for you.

Email: support@busoftware.com.au

Thank you

Any further questions please contact us at
support@buzsoftware.com.au