

How-To Guide Configuring Employee Sales

Document Type: External

Document Version: 1.0

Date: 12 March 2021

Author: Michael Tolson

Table of Contents

Introduction.....	3
Overview	3
Prerequisites.....	3
Resources	3
Prior Training/Experience.....	3
Fundamentals.....	4
Selling to Employees.....	4
Manual Employee Discounts	4
Employee Sale	4
Discount Types	5
Configuration.....	6
Employee Configuration	6
Employee Sale Reason Type	8
Employee Cards	10
Discount Types	14
Fixed Discount	14
Employee Discount.....	15
Employee Spend	21
Employee Grade	23
Employee Grade Spend	28
Employee Grade By MMG	29
Employee Grade Spend By MMG	33
Promotions	34
Product Restrictions	36
About This Document.....	37
Current Document Version information.....	37
Document Context	37
Document Inquiries	37
Document History	38

Introduction

The purpose of this guide is to show how to configure various aspects to effectively manage Employee Sales. While Enactor supports multiple ways of providing products at a discount to Employees, this guide will focus on the Employee Sale which provides the most robust flexibility and control.

Overview

The following areas will be reviewed as part of configuring the Employee Sale:

- Employees
- Reason Codes
- Employee Cards
- Employee Grades
- Employee Accounts
- Promotions

Prerequisites

Resources

Before starting, you should have the following resources in place:

- Enactor Estate Manager
- Enactor POS (configured within the UK Region, connected to the Estate Manager)
- Standard Configuration, including:
 - Base Configuration
 - UK Retail (I have used UK in this example, but it could be other regional config packs. If you import the UK Retail config, the tax configuration described will already exist. Please note that in this guide we will go through the process of creating the configuration from scratch, as an example.)
- Examples of Data to be used as models, particularly Employee

Prior Training/Experience

You should be familiar with the following:

- Estate Manager configuration
- Enactor configuration concepts, including Locations, POS Terminals, Products, Discounts, Promotions etc.
- Data broadcasting
- Standard POS Sales processes

Fundamentals

Selling to Employees

Retailers understand that having employees who use, understand and are passionate about the products and services that they offer can be an asset. By providing additional discounts to their employees, retailers not only get product into the hands of the people responsible for selling it but also create an important recruiting and retention tool. Tighter margins have caused many retailers to reduce or eliminate Employee Discounts.

The Enactor solution supports numerous options on ways to manage an Employee Sale. Discounts can be calculated and applied based on the Employee, Employee Grade, Employee Group or MM Group. Additionally, Employees can be limited on the value of product purchased or amount of discount received over a period of time. The Enactor Promotions Engine can even be leveraged to create meaningful Employee-only offers that can help increase basket size and recover lost margin.

Manual Employee Discounts

While not covered in detail within this guide, Enactor does support the use of manually applied Employee Discounts. These are created and managed using Item and Transaction Discount Reason Codes and therefore do not offer the enhanced flexibility and control found when using the Employee Sale Transaction Type.

Employee Sale

An Employee Sale is a unique Transaction Type within the Enactor solution. This provides the ability to reconsider any number of business rules and change their behaviour when compared to a traditional retail transaction. In addition to specifying the type of discount, an Employee Sale Reason also has the ability to enforce employee validation, track spending/received discount, enforce allowable tenders as well as other discount related parameters.

Discount Types

There are many different Discount Types that can be supported by an Employee Sale. Each Discount Type will drive various configuration requirements:

Fixed: All employees receive a single, fixed Discount Percentage as specified in the Employee Sale Reason.

Employee: When selecting the Employee Discount Type, the discount percentage is specified within the Employee Record which permits the use of different discount percentages for different employees. This Discount Type supports a 2-level discount scheme which utilises an accumulated discount balance threshold to determine the appropriate level.

Employee Spend: Similar to the Employee Discount Type above with the exception that accumulated spend balance is used to affect the discount level. Spend is based on the pre-discount value of merchandise.

Employee Grade: The Employee Grade Discount Type permits assigning a Discount Percentage based on the Employees Grade within the organisation. As with the Employee Discount Type mentioned previously, a 2-level discount scheme can be defined which utilises an accumulated discount balance to select the appropriate level.

Employee Grade Spend: This Discount Type is selected when it is preferred to use an accumulated spend balance to select the appropriate Employee Grade discount level. Spend is based on the pre-discount value of merchandise.

Employee Grade By MMG: This is a variation of the Employee Grade Discount Type. When selecting Employee Grade by MMG, it is possible to specify 2 discount levels for multiple MM Groups. A pre-set accumulated discount threshold is used to determine discount level as with other Discount Types. The Employee Grade by MMG Discount Type also permits specifying discounts by Product ID.

Employee Grade Spend By MMG: Conceptually similar to the above Discount Type with the exception that accumulated spend is used to determine discount level. Spend is based on the pre-discount value of merchandise.

Promotions: While not an actual Discount Type, it is worth noting that the Enactor Promotions Engine supports the utilisation of Promotions within an Employee Sale. Promotions for general customers can be allowed within an Employee Sale and Promotions can be configured to only be available in Employee Sales. Promotions can also be specific to Employee Grades as well as Employee Groups. Promotions can be used in conjunction with all the Discount Types mentioned above. The discount amount received from a Promotion can contribute to the accumulated discount balance.

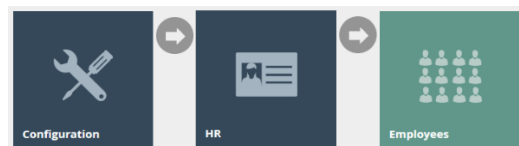
Configuration

Each Discount Type mentioned previously drives a different approach for configuration. The following sections on the configuration of Employees, Employee Sale Reason Type and Employee Cards cover the core settings that are independent of Discount Type. Additional instructions specific to each Discount Type are found later in the document.

Employee Configuration

Enactor maintains Employee records independently from User records for the purpose of managing Employee Sales. It is important to note that these entities are truly independent so that a User record entry does not imply an Employee record. Typically, Employee data will be interfaced to Enactor from a 3rd party system, but we will cover manual entry in this guide to reinforce the concepts.

Employees are defined using the Employees option, obtained *via* the selection sequence shown at right starting from the Main Menu:

The 'Employee Maintenance' screen features a header bar with a title and window controls. Below the header, there are filter fields for 'Employee ID' and 'Surname', each with a 'Starts With' dropdown and an input field. Below these are 'Apply Filters' and 'Reset Filters' buttons. The main area contains a table with four columns: 'Employee ID', 'Surname', and 'Forename'. The table lists four employees: John Doe (ID 10), Sam Granger (ID 1), Michael Tolson (ID 99), and John Wood (ID 3). Each row has icons for edit, delete, and view. At the bottom, there is a pagination bar showing 'Page 1 of 1' and 'Page Size 10', along with buttons for 'Create a new Employee' and 'Export Employees'.

To create a new Employee record, click 'Create a new Employee'.

The 'Employee Maintenance' screen for creating a new employee shows a message: 'You are adding a new employee, please enter the ID:'. Below this is an input field for 'Employee ID' and an 'Autogenerate ID' button. At the bottom, there are 'Back' and 'Create' buttons.

The Employee ID can be entered, or the system can be generated.

Employee Maintenance

Save

Cancel

You are editing Employee ID: '4'

General

Address

Groups

Title

Mr

Surname*

Testman

Forename

Tom

Initials

Date Of Birth

Sex

-

Employee Grade

-

Employee Discount

0%

Employee Allowance Discount

0%

Employee Discount Allowance

£0.00

Normal Working Location

-

Automatic Employee Sale

☐

Employee Sale Reason

-

Image (Preloaded)

Image URL

Requires Identity

☒

Employee External Reference

* Denotes Mandatory

Very limited information is mandatory in the Employee record. Some of the optional fields directly influence the Employee Sale functionality regardless of the Discount Type selected. The Normal Working Location ties an Employee to a Location which can be helpful when searching for an Employee. The Automatic Employee Sale option initiates an Employee Sale when the Employee is added to the transaction via Loyalty if enabled. When using the Automatic Employee Sale option, select the Employee Sale Reason from the dropdown.

The following options are handled differently depending on the Employee Discount Type being used: Employee Grade, Employee Discount, Employee Allowance Discount and Employee Discount Allowance. Configuration of these options will be reviewed by Discount Type later in this document.

Employee Sale Reason Type

The configuration of Reasons is covered in a separate guide. Please refer to that guide for information on navigating to and use of the Reason Maintenance application.

The Employee Sale Reason Type governs the authorization and business rules when executing an Employee Sale transaction.

The screenshot displays the 'Reason Maintenance' application window. At the top, there is a title bar with the text 'Reason Maintenance' and standard window controls. Below the title bar, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing Employee Sale Reason ID: 'ES-UK1' for region 'United Kingdom''. The main content area has five tabs: 'General', 'Employee Sale', 'Applicable Tenders', 'Price Types', and 'Price Change Types'. The 'General' tab is selected. It contains the following fields: 'Description*' with the value 'Employee Sale' and a language dropdown set to 'English (UK)'; 'Function Authorisation Code' with a dropdown showing '-'; 'Capture Reference Number?' with an unchecked checkbox; 'Parent Reason ID' with a dropdown showing '-'; 'Reason Start Date' with a date picker; and 'Reason End Date' with a date picker. A red asterisk at the bottom left indicates that fields marked with an asterisk are mandatory.

The General tab is consistent with all other Reason Types. Please review the configuration guide on Reasons for more information regarding these options.

Reason Maintenance
? || x

Save Cancel

You are editing Employee Sale Reason ID: 'ES-UK1' for region 'United Kingdom'

General	Employee Sale	Applicable Tenders	Price Types	Price Change Types
Capture Employee ID	<input checked="" type="checkbox"/>			
Affect Employee Balance?	<input type="checkbox"/>			
Commit Balance Online	<input type="checkbox"/>			
Adjust Balance by	Discount			
Allow if Account Balance Offline?	<input type="checkbox"/>			
Check Employee Signature?	<input type="checkbox"/>			
Validate Employee Card	<input type="checkbox"/>			
Check in Employee Database	<input type="checkbox"/>			
Discount Applies After Promotions	<input type="checkbox"/>			
Discount Type	Fixed			
Discount Percentage	15%			
Rounding Rule	Down			
Number of Copy Receipts	0			
Allow Overlap?	<input checked="" type="checkbox"/>			
Exclude Receipt Return Items	<input type="checkbox"/>			

The Employee Sale tab includes settings related to employee validation, discount eligibility and discount methodology.

The Capture Employee ID option requires that an Employee ID be entered at the start of an Employee Sale. If the Employee ID is to be validated, the Check in Employee Database option must also be selected. If an Employee Card with a number different from the Employee ID is to be used for validation the Validate Employee Card option should be selected. See the following section on configuring Employee Cards if appropriate.

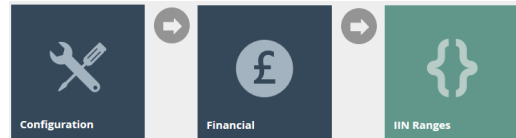
Additional Settings on the Employee Sale tab can impact how discounts are applied regardless of the Discount Type being used. The Discount Applies After Promotions will apply the selected discount after any eligible Promotions are applied. The Allow Overlap? option permits the Employee Sale Discount to overlap with other Reason Type driven Discounts. The Exclude Receipt Return Items will not apply the Employee Sale Discount to items that are part of a Receipt Return assuming they were originally purchased without an Employee Sale Discount.

Many of the remaining settings will be used differently depending on the Discount Type selected. These items will be reviewed in detail by Discount Type later in this document.

Employee Cards

As discussed previously, it is possible to issue Employee Cards that must be scanned to initiate an Employee Sale. For security reasons, the ID used for the Employee Card is not a derivative of the Employee ID. The initial step of setting up Employee Cards is defining the IIN Range so POS can recognize the card.

IIN Ranges are defined using the IIN Ranges option, obtained *via* the selection sequence shown at right starting from the Main Menu:



IIN Range Maintenance

Range Start: Starts With

Range End: Starts With

Minimum PAN Length:

Maximum PAN Length:

Apply Filters Reset Filters

	Range	PAN Length	Card Type	Description
	1111-1111	12		Customer Account CANADA
	2222-2222	12		Customer Account USA
	95263006-95263006	19		Loyalty - USA
	95263007-95263007	19		Employee Account Card USA
	95263008-95263008	19		Gift Card USA
	95263009-95263009	19		Loyalty - UK
	95263010-95263010	19		Employee Account Card UK
	95263011-95263011	19		Gift Card Canada
	95263012-95263012	19		Employee Card UK

Page 1 of 1 Page Size 10

Create a new IIN Range

To create a new IIN Range click 'Create a new IIN Range'.

IIN Range Maintenance

You are adding a new Range, please enter the details below:

Range Start:

Range End:

Minimum PAN Length:

Maximum PAN Length:

Back Create

The first step is to specify the Range Start and Range End for the Employee Card. The Minimum and Maximum PAN Length is also specified on the initial screen. Once the fields have been completed, click 'Create'.

IIN Range Maintenance

Save Cancel

You are editing Range 95263012-95263012 for PAN length 19.

General Track Data Applicable Cards

Card Description* Employee Card UK

Issuer Description

Payment Card Type -

Second Payment Card Type -

Embossed Digit Group Lengths (e.g. 4,6,12)

No LUHN Check Digit ☒

Expiry Date Limit Check ☐

Country United Kingdom

Currency Pounds Sterling

* Denotes Mandatory

There are multiple tabs displayed within IIN Range Maintenance. On the General tab, only a Card Description is required. Assuming the card number does not include a LUHN Check Digit, be sure that option is selected.

IIN Range Maintenance

Save Cancel

You are editing Range 95263012-95263012 for PAN length 19.

General Track Data Applicable Cards

	Track	Start	Length	Keyable
PAN Attributes	2	0	19	<input checked="" type="checkbox"/>
Expiry Date Attributes	0	0	0	<input type="checkbox"/>
Start Date Attributes	0	0	0	<input type="checkbox"/>
Months Valid Attributes	0	0	0	<input type="checkbox"/>
Issue Number Attributes	0	0	0	<input type="checkbox"/>
Service Code Attributes	0	0	0	<input type="checkbox"/>
Custom Attributes 1	0	0	0	<input type="checkbox"/>
Custom Attributes 2	0	0	0	<input type="checkbox"/>
Custom Attributes 3	0	0	0	<input type="checkbox"/>
Custom Attributes 4	0	0	0	<input type="checkbox"/>

If the Employee Card is to use a magnetic strip, the details on where the PAN exists must be specified on the Track Data tab.

IIN Range Maintenance

Save Cancel

You are editing Range 95263012-95263012 for PAN length 19.

General Track Data Applicable Cards

Payment Card ☐

Cheque Card ☐

Loyalty Card ☐

External Loyalty Provider ☐

Online Update ☐

Loyalty Scheme

Tier Code

ETop Up Card ☐

ETop Up Product ID

ETop Up Product Group ID

Gift Card ☐

Gift Card Type

Employee Card ☒

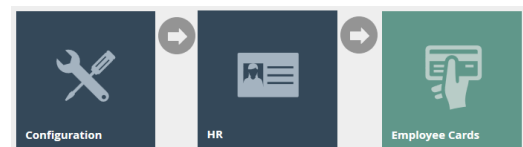
Customer Account Card ☐

Tax-Free Request Identifier ☐

In the Applicable Cards tab, select the Employee Card option.

Once the IIN Range for Employee Cards have been established, it is possible to associate a card with an Employee ID by using the Employee Card Maintenance application.

Employee Cards are configured using the Employee Cards option, obtained via the selection sequence shown at right starting from the Main Menu:



Employee Card Maintenance

Card Number Starts With

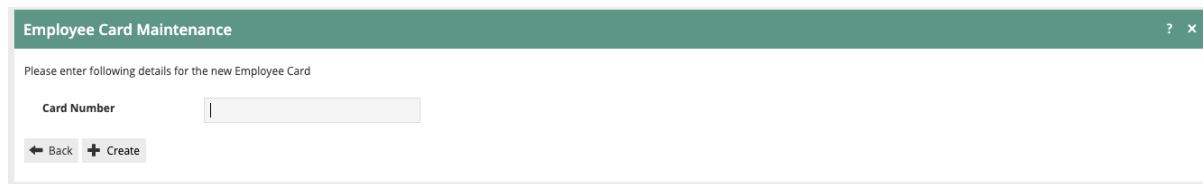
Employee ID Starts With

Apply Filters Reset Filters

	Card Number	Employee ID
	9526301212345678901	99

Page 1 of 1 Page Size Create a new Employee Card

Begin by clicking 'Create a new Employee Card'.



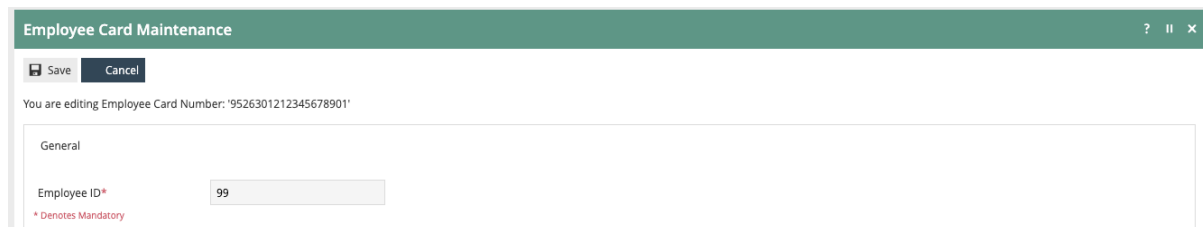
Employee Card Maintenance

Please enter following details for the new Employee Card

Card Number

[← Back](#) [+ Create](#)

Enter the Card Number and click 'Create'.



Employee Card Maintenance

[Save](#) [Cancel](#)

You are editing Employee Card Number: '9526301212345678901'

General

Employee ID*

* Denotes Mandatory

Enter the Employee ID that is to be associated with the Employee Card Number and save.

Now, when using the Validate Employee Card option in the Employee Sale Reason, the Employee Card will be required for employee validation.

Discount Types

At this point, each Discount Type will be reviewed individually. This will include the specific configuration required within the Employee Record, Employee Sale Reason and other areas. The following examples all have the Capture Employee ID and Check in Employee Database options enabled to perform employee validation at the start of the transaction.

Fixed Discount

All configuration needed to support a Fixed Discount Type can be completed within the Employee Sale Reason.

The screenshot shows the 'Reason Maintenance' window for editing Employee Sale Reason ID: 'ES-UK1' for region 'United Kingdom'. The 'General' tab is selected, showing various configuration options. The 'Capture Employee ID' and 'Check in Employee Database' options are checked. The 'Discount Type' is set to 'Fixed', the 'Discount Percentage' is 15%, and the 'Rounding Rule' is 'Down'.

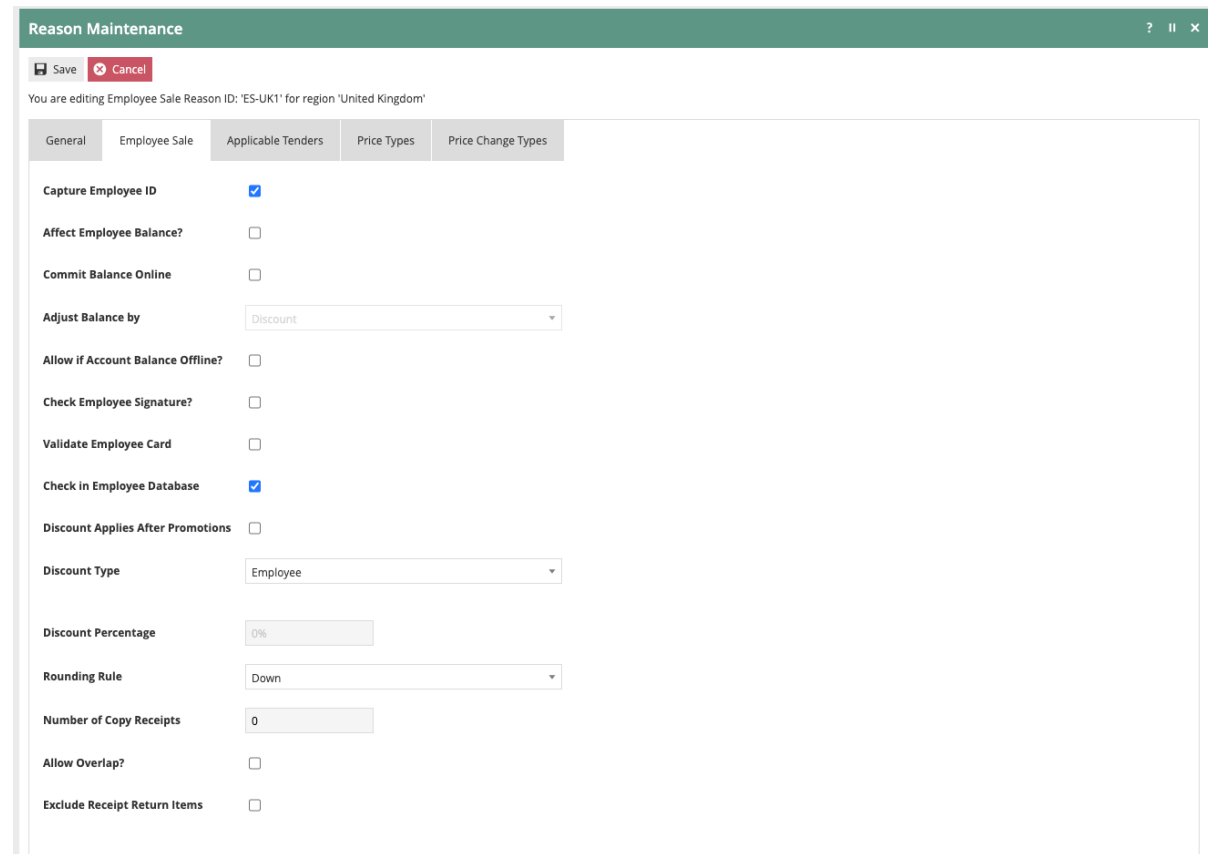
Option	Value
Capture Employee ID	<input checked="" type="checkbox"/>
Affect Employee Balance?	<input type="checkbox"/>
Commit Balance Online	<input type="checkbox"/>
Adjust Balance by	Discount
Allow if Account Balance Offline?	<input type="checkbox"/>
Check Employee Signature?	<input type="checkbox"/>
Validate Employee Card	<input type="checkbox"/>
Check in Employee Database	<input checked="" type="checkbox"/>
Discount Applies After Promotions	<input type="checkbox"/>
Discount Type	Fixed
Discount Percentage	15%
Rounding Rule	Down
Number of Copy Receipts	0
Allow Overlap?	<input type="checkbox"/>
Exclude Receipt Return Items	<input type="checkbox"/>

In the Discount Type dropdown, select 'Fixed'. Enter the desired Discount Percentage and Rounding Rule.

Employee Discount

Without Balance Tracking

To support the Employee Discount Type, configuration of the Employee Sale Reason and the Employee Record are required.



The screenshot shows the 'Reason Maintenance' window with the 'Employee Sale' tab selected. The window title is 'Reason Maintenance' and it includes 'Save' and 'Cancel' buttons. A message states: 'You are editing Employee Sale Reason ID: 'ES-UK1' for region 'United Kingdom''. The 'Employee Sale' tab is active, showing various configuration options for the Employee Discount.

General	Employee Sale	Applicable Tenders	Price Types	Price Change Types
Capture Employee ID <input checked="" type="checkbox"/>				
Affect Employee Balance? <input type="checkbox"/>				
Commit Balance Online <input type="checkbox"/>				
Adjust Balance by <input type="text" value="Discount"/>				
Allow if Account Balance Offline? <input type="checkbox"/>				
Check Employee Signature? <input type="checkbox"/>				
Validate Employee Card <input type="checkbox"/>				
Check in Employee Database <input checked="" type="checkbox"/>				
Discount Applies After Promotions <input type="checkbox"/>				
Discount Type <input type="text" value="Employee"/>				
Discount Percentage <input type="text" value="0%"/>				
Rounding Rule <input type="text" value="Down"/>				
Number of Copy Receipts <input type="text" value="0"/>				
Allow Overlap? <input type="checkbox"/>				
Exclude Receipt Return Items <input type="checkbox"/>				

In the Employee Sale Reason, set the Discount Type as Employee on the Employee Sale tab.

Employee Maintenance

Save

Cancel

You are editing Employee ID: '99'

General

Address

Groups

Title

Surname*

Tolson

Forename

Michael

Initials

Date Of Birth

Sex

-

Employee Grade

Non-Exempt

Employee Discount

12%

Employee Allowance Discount

0

Employee Discount Allowance

£0.00

Normal Working Location

Estate Manager

Automatic Employee Sale

☒

Employee Sale Reason

-

Image (Preloaded)

Image URL

Requires Identity

☐

Employee External Reference

* Denotes Mandatory

Within the Employee Record, enter the desired Employee Discount percentage. The Employee Allowance Discount and Employee Discount Allowance fields will not have entries since a Discount Balance is not being tracked. Each Employee Record must have an Employee Discount percentage specified.

With Balance Tracking

When using the Employee Discount Type, it is possible to configure a 2-tier discount scheme. This permits a retailer to offer a higher Employee Discount amount initially but reduce it once an employee has received a certain level of benefits over a period of time. The following example assumes that the accumulated discount balance will be tracked within Enactor.

Configuration of the Employee Sale Reason is done in the same manner mentioned previously with a few additional settings.

The screenshot shows the 'Reason Maintenance' window for Employee Sale Reason ID 'ES-US1' in the 'United States' region. The 'Employee Sale' tab is active, displaying various configuration options. The 'General' tab is also visible. The 'Employee Sale' tab includes the following settings:

- Capture Employee ID:** ☒
- Affect Employee Balance?:** ☒
- Commit Balance Online:** ☒
- Adjust Balance by:**
- Allow if Account Balance Offline?:** ☐
- Check Employee Signature?:** ☒
- Validate Employee Card:** ☐
- Check in Employee Database:** ☒
- Discount Applies After Promotions:** ☐
- Discount Type:**
- Discount Percentage:**
- Rounding Rule:**
- Number of Copy Receipts:**
- Allow Overlap?:** ☒
- Exclude Receipt Return Items:** ☐

Selecting the Affect Employee Balance? initiates the processes needed to validate and update employee balances. The Commit Balance Online option indicates that the tracking will be done within Enactor. The Adjust Balance by option indicates if the discount levels are based on accumulated Discount or Spend. In this case, the balance will be maintained by accumulated Discount.

The Employee Record is configured in the same manner as before, but additional options will now be specified.

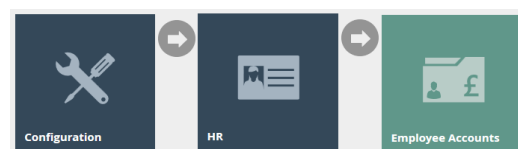
The screenshot shows the 'Employee Maintenance' window with tabs for 'General', 'Address', and 'Groups'. The 'General' tab is active, displaying a form for editing Employee ID: '10'. The form includes fields for Title (Mr), Surname (Doe), Forename (John), Initials (S), Date Of Birth (17 August 1964), Sex (Male), Employee Grade (-), Employee Discount (5%), Employee Allowance Discount (20%), Employee Discount Allowance (£500.00), Normal Working Location (Estate Manager), Automatic Employee Sale (unchecked), Employee Sale Reason (-), Image (Preloaded) (-), Image URL, Requires Identity (checked), and Employee External Reference. A red asterisk indicates that fields marked with an asterisk are mandatory.

To configure a 2-level discount scheme, the initial discount amount is entered as the Employee Allowance Discount. The discount amount after the threshold is exceeded is entered as the Employee Discount. The threshold amount is the Employee Discount Allowance.

In the example above, an Employee will receive a 20% employee discount at the start of a period. Once they have accumulated \$500 in Employee Discounts, they will only receive a 5% discount through the end of the period.

When using a Discount Type that depends on Balance Tracking, an Employee Account must be created. This is where the balance will be maintained.

Employee Accounts are maintained using the Employee Accounts option, obtained *via* the selection sequence shown at right starting from the Main Menu:












Employee Account Maintenance
? || x

Account Type
-
Hide

Account ID
Starts With

Apply Filters
Reset Filters

	Account ID	Type	Status	Opened Date
  	1	Discount Balance	New	22/08/14
  	3	Discount Balance	Active	22/04/14
  	8	Credit	Active	22/06/16

Page 1 of 1
Page Size
10

+ Create a new Employee Account

Click the 'Create a new Employee Account' button.

Employee Account Maintenance
? || x

Please enter following details for the new Employee Account

Type
Discount Balance

Account ID

Back
Create

Select the Type of account from the dropdown. Since the account is tracking accumulated discount in this example, select Discount Balance. The Account ID is set to the Employee ID. The account can now be created.

Employee Account Maintenance
? || x

Save
Cancel

You are editing Employee Account ID: '10' Type: 'Discount Balance'

General

Status*
Active

Opened Date
21 August 2014

Currency
Pounds Sterling


Balance
£500.00

* Denotes Mandatory

Since the account is being created manually, the amount entered on the Employee record for the Employee Discount Allowance must be entered as the Balance for the Employee Account. The account can now be saved. Once the changes have been broadcast, discounts received on Employee Sales will accumulate in the account. Be sure to set the Status to Active to fully enable the account.

When an Employee Sale is initiated at POS, the Employee information along with the Account Balance is displayed. The Account Balance represents the amount of discount value available at the Employee Allowance Discount level. Once the Account Balance reaches £0.00, the discount level will be switched to the Employee Discount.

enactor



Trans - 95
Mar 12, 2021 12:56:53 PM
Till 26 - Sarah Maroon

Employee ID:
Name:
Account Balance:

Please confirm the employee details

7	8	9	CLR
4	5	6	ENT
1	2	3	
0		.	

OK

Back

Cancel

TOTAL £0.00

Once the Employee Discount Allowance is reached, the discount percentage will switch from the Employee Allowance Discount to the Employee Discount Amount. The retailer will reset the Account Balance when they reach the end of their defined period.

Employee Spend

The Employee Spend Discount Type is a variation of the Employee Discount Type with Balance Tracking. This Discount Type uses an accumulated spend balance to determine which discount level is available.

There Employee Sale Reason configuration is very similar to the previous example. The changes required can be seen below.

The screenshot shows the 'Reason Maintenance' window with the 'Employee Sale' tab selected. The configuration is for Employee Sale Reason ID: 'ES-UK1' for region 'United Kingdom'. The 'General' tab is active, showing various settings:

- Capture Employee ID:** ☒
- Affect Employee Balance?** ☒
- Commit Balance Online:** ☒
- Adjust Balance by:** Total Spend (dropdown)
- Allow if Account Balance Offline?** ☐
- Check Employee Signature?** ☒
- Validate Employee Card:** ☐
- Check in Employee Database:** ☒
- Discount Applies After Promotions:** ☐
- Discount Type:** Employee Spend (dropdown)
- Discount Percentage:** 0% (input field)
- Rounding Rule:** Down (dropdown)
- Number of Copy Receipts:** 0 (input field)
- Allow Overlap?** ☒
- Exclude Receipt Return Items:** ☐

In the Employee Sale Reason configuration, select a Discount Type of Employee Spend and set the Adjust Balance by option to Total Spend.

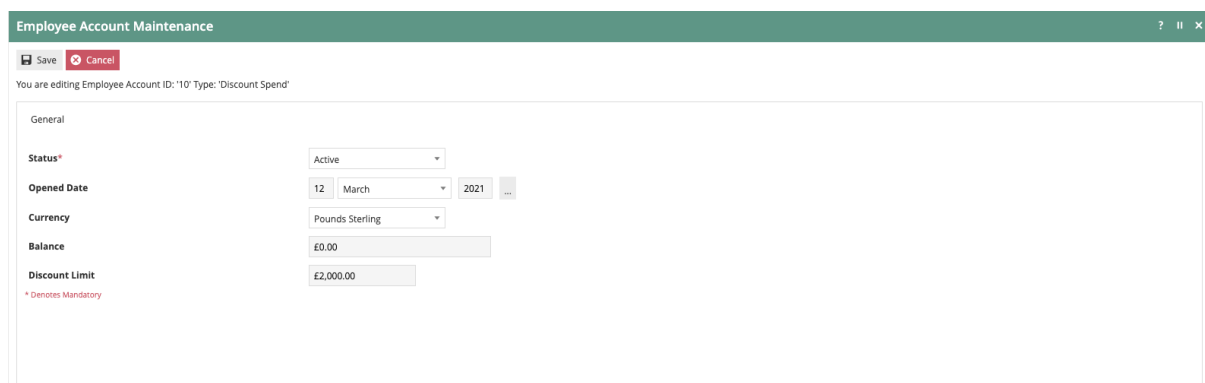
The Employee Record is configured in the same way as the previous example. Note that it is not necessary to make an entry for the Employee Discount Allowance when using this Discount Type.

When tracking by Total Spend, a different Employee Account Type is required. This Discount Type is used with a Discount Spend Employee Account Type. The setup is similar to the previous example.



The screenshot shows the 'Employee Account Maintenance' window. It has a title bar with a question mark, a list icon, and a close icon. Below the title bar, it says 'Please enter following details for the new Employee Account'. There are two fields: 'Type' with a dropdown menu showing 'Discount Spend', and 'Account ID' with a text box containing '10'. At the bottom left, there are two buttons: 'Back' with a left arrow and 'Create' with a plus icon.

Select Discount Spend from the Type dropdown and enter the Employee ID as the Account ID and click 'Create'.



The screenshot shows the 'Employee Account Maintenance' window with the 'General' tab selected. At the top left, there are 'Save' and 'Cancel' buttons. Below them, it says 'You are editing Employee Account ID: '10' Type: 'Discount Spend''. The 'General' section contains several fields: 'Status*' with a dropdown menu showing 'Active', 'Opened Date' with a date picker showing '12 March 2021', 'Currency' with a dropdown menu showing 'Pounds Sterling', 'Balance' with a text box containing '£0.00', and 'Discount Limit' with a text box containing '£2,000.00'. At the bottom left, there is a red asterisk and the text '* Denotes Mandatory'.

Once the account is created, enter the Discount Limit. The Discount Limit represents the allowable amount of accumulated spend within Employee Sale transactions before the discount changes from the Employee Allowance Discount to the Employee Discount specified in the Employee Record. Be sure to set the Status to Active to fully enable the account.

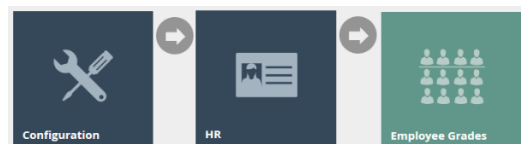
When initiating an Employee Sale at POS, the Employee Information will be displayed along with the current Account Balance. The Account Balance represents the remaining amount that can be spent within Employee Sales before the shift in discount level.

The screenshot shows the enactor POS interface. At the top, the enactor logo is on the left, and transaction details (Trans - 98, Mar 12, 2021 1:54:42 PM, Till 26 - Sarah Maroon) are on the right. Below the header, there are three input fields: Employee ID (10), Name (Mr John Doe), and Account Balance (£2,000.00). To the right of these fields is a blue link that says "Please confirm the employee details". Below the input fields is a numeric keypad with buttons for digits 0-9, a decimal point, and a blue "ENT" button. At the bottom left is an "OK" button, and at the bottom right are "Back" and "Cancel" buttons. On the far right, there is a "TOTAL" label and a value of "£0.00".

Employee Grade

In the previous examples, it has been demonstrated how to apply a consistent level across all Employees as well as being able to specify discount level by Employee. An additional option is available that permits setting the Employee Discount by Employee Grade. An Employee Grade is part of the retailer's HR structure that groups similar job roles and or pay ranges into Employee Grades. When using a Discount Type of Employee Grade, the Employee Account Balance will be tracked by Discount.

Employee Grades are defined using the Employee Grades option, obtained *via* the selection sequence shown at right starting from the Main Menu:



Employee Grade Maintenance ? II X

Employee Grade ID Starts With Hide

	Employee Grade ID	Description
	EXEMPT01	Exempt 1

Page 1 of 1 Page Size 10

From the Employee Grade Maintenance application, click 'Create a New Employee Grade'.

Employee Grade Maintenance ? II X

Please enter following details for the new Employee Grade

Employee Grade ID

Enter the Employee Grade ID and click 'Create'.

Employee Grade Maintenance ? II X

You are editing Employee Grade ID: 'NONEX1'

General MMG Discount Product Discount

Description*

Employee Grade Discount

Employee Grade Allowance Discount

Employee Grade Discount Allowance

* Denotes Mandatory

Once the Employee Grade has been created, enter a Description for the Grade. Similar to the Employee Discount Type, multiple levels of Employee Discount can be specified. The Employee Grade Allowance Discount represents the Discount that will be applied before the Employee Grade Discount Allowance level is met. The Employee Grade Discount is the Discount that will be applied after Employee Grade Discount Allowance level is exceeded. The MMG Discount and Product Discount tabs are only used with other Discount Types.

Once all Employee Grades have been created, proceed with the following configuration.

The Employee Sale Reason configuration is similar to previous Discount Types.

Reason Maintenance

Save

Cancel

You are editing Employee Sale Reason ID: 'ES-UK1' for region 'United Kingdom'

General

Employee Sale

Applicable Tenders

Price Types

Price Change Types

Capture Employee ID

☒

Affect Employee Balance?

☒

Commit Balance Online

☒

Adjust Balance by

Discount

Allow if Account Balance Offline?

☐

Check Employee Signature?

☒

Validate Employee Card

☐

Check in Employee Database

☒

Discount Applies After Promotions

☐

Discount Type

Employee Grade

Discount Percentage

0%

Rounding Rule

Down

Number of Copy Receipts

0

Allow Overlap?

☒

Exclude Receipt Return Items

☐

The Discount Type should be set to Employee Grade and select Discount for the Adjust Balance by option.

An Employee Grade must be specified for each Employee.

Employee Maintenance

Save Cancel

You are editing Employee ID: '10'

General Address Groups

Title Mr

Surname* Doe

Forename John

Initials S

Date Of Birth 17 August 1964

Sex Male

Employee Grade Non-Exempt 01

Employee Discount

Employee Allowance Discount

Employee Discount Allowance

Normal Working Location Estate Manager

Automatic Employee Sale

Employee Sale Reason

Image (Preloaded)

Image URL

Requires Identity ☒

Employee External Reference

* Denotes Mandatory

Select the appropriate Employee Grade for the Employee. Note, it is not necessary to specify Employee Discount, Employee Allowance Discount or Employee Discount Allowance in the Employee record when using the Employee Grade Discount Type.

An Employee Account will need to be created to be used with the Employee Grade Discount Type.

Employee Account Maintenance

Please enter following details for the new Employee Account

Type Grade Discount Balance

Account ID 10

Back Create

When creating the Employee Account, select Grade Discount Balance as the Type. The Account ID is set to the same value as the Employee ID.

Employee Account Maintenance

?

||

×

Save

Cancel

You are editing Employee Account ID: '10' Type: 'Grade Discount Balance'

General

Status*

Active

Opened Date

12

March

2021

...

Currency

Pounds Sterling

Balance

£500.00

Employee Grade

Non-Exempt 01

* Denotes Mandatory

Once the Account has been created, set the Balance to the desired Employee Grade Discount Allowance and select the employee's grade from the dropdown. Be sure to set the Status to Active to fully enable the account.

At POS, the information shown at the beginning of an Employee Sale is consistent with other Discount Types that use Discount Balance tracking.

Employee Grade Spend

This Discount Type is a variant of the Employee Grade Discount Type. The Employee Grade Spend Discount Type differs in that Balance Tracking is done by Spend as opposed to Discount.

The configuration of Employee Grades and associated changes to the Employee record are done as explained in the previous section.

The configuration of the Employee Sale Reason is shown below.

The screenshot shows the 'Reason Maintenance' interface. At the top, there's a header bar with 'Reason Maintenance' and a status bar indicating 'You are editing Employee Sale Reason ID: 'ES-UK1' for region 'United Kingdom''. Below the header, there are tabs for 'General', 'Employee Sale', 'Applicable Tenders', 'Price Types', and 'Price Change Types'. The 'General' tab is active. The form contains the following fields and options:

- Capture Employee ID:** ☒
- Affect Employee Balance?** ☒
- Commit Balance Online:** ☒
- Adjust Balance by:** Total Spend (dropdown menu)
- Allow if Account Balance Offline?** ☐
- Check Employee Signature?** ☒
- Validate Employee Card:** ☐
- Check in Employee Database:** ☒
- Discount Applies After Promotions:** ☐
- Discount Type:** Employee Grade Spend (dropdown menu)
- Discount Percentage:** 0% (input field)
- Rounding Rule:** Down (dropdown menu)
- Number of Copy Receipts:** 0 (input field)
- Allow Overlap?** ☒
- Exclude Receipt Return Items:** ☐

Be sure that the Adjust Balance by option is set to Total Spend and the Discount Type is Employee Grade Spend.

An Employee Account will need to be created to be used with the Employee Grade Spend Discount Type.

The screenshot shows the 'Employee Account Maintenance' interface. At the top, there's a header bar with 'Employee Account Maintenance' and a status bar indicating 'Please enter following details for the new Employee Account'. Below the header, there are two input fields:

- Type:** Grade Discount Spend (dropdown menu)
- Account ID:** 10 (input field)

At the bottom, there are two buttons: 'Back' and 'Create'.

The Employee Account Type is set to Grade Discount Spend. The Account ID should be set to the associated Employee ID.

Employee Account Maintenance ? || x

Save Cancel

You are editing Employee Account ID: '10' Type: 'Grade Discount Spend'

General	
Status*	Active
Opened Date	12 March 2021
Currency	Pounds Sterling
Balance	£0.00
Employee Grade	Non-Exempt 01
Discount Limit	£2,000.00

* Denotes Mandatory

Once the account has been created, the appropriate Employee Grade should be selected, and the Employee Grade Discount Allowance is entered. Be sure to set the Status to Active to fully enable the account.

At POS, the information shown at the beginning of an Employee Sale is consistent with other Discount Types that use Spend Balance tracking.

Employee Grade By MMG

The Employee Grade By MMG Discount Type not only allows different discount levels based on Employee Grade but it also permits specifying different discount levels by MM Group and Product ID. The Employee Grade By MMNG Discount Type utilises Balance Tracking by Discount to determine discount level.

Employee Grades are created in the same manner as described in the Employee Grade Discount Type.

Employee Grade Maintenance ? || x

Save Cancel

You are editing Employee Grade ID: 'NONEX1'

General	MMG Discount	Product Discount
Description*		
Non-Exempt 01		
Employee Grade Discount		
0%		
Employee Grade Allowance Discount		
0%		
Employee Grade Discount Allowance		
£500.00		

* Denotes Mandatory

The Employee Grade Discount and Employee Grade Allowance Discount fields are not used with this Discount Type. The Employee Grade Discount Allowance is still used to specify the Discount Balance level that will result in a change of discount levels.

Employee Grade Maintenance ? || x

Save Cancel

You are editing Employee Grade ID: 'NONEX1'

General MMG Discount Product Discount

	Groupid	MM Group	Start Date	End Date	Discount Rate	Default Rate
	MENS_SHIRTS	Mens Shirts	01/03/21	31/03/21	20%	10%
	MENS_SHOES	Mens Shoes	01/03/21	31/03/21	30%	15%
+ Add		FRAGRANCE - Fragrance	<input type="text"/>	<input type="text"/>	0%	0%

On the MMG Discount tab, specify the desired MM Group, effective dates and Discount Rates. Start by selecting the MM Group from the dropdown. Specify the Start Date and the End Date for the discount. The Discount Rate will be applied before the Employee Grade Discount Allowance is met and the Default Rate will be used after the allowance is met. Once all entries have been made, click the 'Add' button.

Employee Grade Maintenance ? || x

Save Cancel

You are editing Employee Grade ID: 'NONEX1'

General MMG Discount Product Discount

	Product ID	Start Date	End Date	Discount
	NL616HN-1	01/03/21	31/03/21	8%
+ Add	<input type="text"/>	<input type="text"/>	<input type="text"/>	0%

On the Product Discount tab, it is possible to specify a Discount for a specific Product ID. Enter a Product ID or click the magnifying glass to search for a product. Enter a Start Date and an End Date for the Discount. A single Discount level is supported when creating a Product Discount.

It is important to note that products that are not listed on the Product Discount tab or are part of an MM Group specified on the MMG Discount tab, will not be discounted in an Employee Sale.

The Employee Sale Reason configuration is shown below.

Reason Maintenance

Save

Cancel

You are editing Employee Sale Reason ID: 'ES-UK1' for region 'United Kingdom'

General

Employee Sale

Applicable Tenders

Price Types

Price Change Types

Capture Employee ID

☒

Affect Employee Balance?

☒

Commit Balance Online

☒

Adjust Balance by

Discount

Allow if Account Balance Offline?

☐

Check Employee Signature?

☒

Validate Employee Card

☐

Check in Employee Database

☒

Discount Applies After Promotions

☐

Discount Type

Employee Grade By MMG

Lookup MMG tree for Employee Grade MMG Discount

☐

Discount Percentage

0%

Rounding Rule

Down

Number of Copy Receipts

0

Allow Overlap?

☒

Exclude Receipt Return Items

☐

An Employee Account will need to be created to be used with the Employee Grade By MMG Discount Type. Employee Account setup will mirror what was described for the Employee Grade Discount Type.

Employee Account Maintenance

Save

Cancel

You are editing Employee Account ID: '10' Type: 'Grade Discount Balance'

General

Status*

Active

Opened Date

12 March 2021

Currency

Pounds Sterling

Balance

£500.00

Employee Grade

Non-Exempt 01

* Denotes Mandatory

At POS, the information displayed at the beginning of an Employee Sale transaction is consistent with other Discount Types that utilise Balance Tracking by Discount. Unlike other Discount Types, it is likely that various discount levels, including no discount, may be shown in the transaction.

HOME

PRODUCTS

Trans - 100

Mar 12, 2021 4:09:28 PM

Till 26 - Sarah Maroon

LOG OUT

Employee Number 10

Mr John Doe

ITEM	SIZE	PRICE
<div> Envelope Handbag Style: NL616HN Colour: CR?ME </div>	S	£22.00
Employee Sale (£22.00 at 8%)		-£1.76
<div> Button Down Collar Red Style: DF517XM Colour: Red </div>	L	£25.95
Employee Sale (£25.95 at 20%)		-£5.19
<div> Chocolate Brownie- 6pk </div>		£5.99
<div> Vans Canvas Shoes Style: VV639JS Colour: Red </div>	8	£59.95
Employee Sale (£59.95 at 30%)		-£17.98
(Employee Sale)		-£24.93

Please scan or enter a product or select another function.

789CLR

456

123ENT

0.

Sales

Product List

Voids

Returns

Discount / Overrides

Management

Orders

SignOff

TOTAL £88.96

TOTAL

Employee Grade Spend By MMG

This is a variant of the Employee Grade By MMG Discount Type where Balance Tracking is done by Spend. When configuring the Employee Grade Spend By MMG Discount Type only the Employee Sale Reason and Employee Account differ from what was explained in the previous section.

The Employee Sale Reason configuration is shown below.

The screenshot shows the 'Reason Maintenance' window for 'Employee Sale Reason ID: 'ES-UK1' for region 'United Kingdom''. The 'General' tab is active, showing various configuration options:

- Capture Employee ID:** ☒
- Affect Employee Balance?** ☒
- Commit Balance Online:** ☒
- Adjust Balance by:** Total Spend (dropdown)
- Allow If Account Balance Offline?** ☐
- Check Employee Signature?** ☒
- Validate Employee Card:** ☐
- Check in Employee Database:** ☒
- Discount Applies After Promotions:** ☐
- Discount Type:** Employee Grade Spend By MMG (dropdown)
- Lookup MMG tree for Employee Grade MMG Discount:** ☐
- Discount Percentage:** 0% (input)
- Rounding Rule:** Down (dropdown)
- Number of Copy Receipts:** 0 (input)
- Allow Overlap?** ☒
- Exclude Receipt Return Items:** ☐

Adjust Balance by should be set to Total Spend. Select Employee Grade Spend By MMG as the Discount Type.

An Employee Account will need to be created to be used with the Employee Grade Spend By MMG Discount Type. Employee Account setup will mirror what was described for the Employee Grade Spend Discount Type.

The screenshot shows the 'Employee Account Maintenance' window for 'Employee Account ID: '10' Type: 'Grade Discount Spend''. The 'General' tab is active, showing various configuration options:

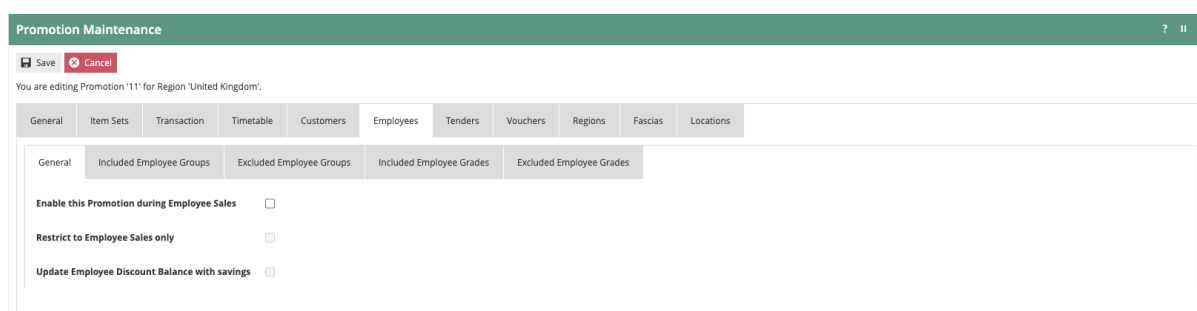
- Status*** Active (dropdown)
- Opened Date** 12 March 2021 (date picker)
- Currency** Pounds Sterling (dropdown)
- Balance** £0.00 (input)
- Employee Grade** Non-Exempt 01 (dropdown)
- Discount Limit** £2,000.00 (input)

* Denotes Mandatory

At POS, the information displayed at the beginning of an Employee Sale transaction is consistent with other Discount Types that utilise Balance Tracking by Spend. Unlike other Discount Types, it is likely that various discount levels, including no discount, may be shown in the transaction. An example can be viewed in the previous section.

Promotions

Promotions are discussed in detail in a separate configuration guide. Please reference that document for detailed information on setting up offers. Once a Promotion has been created, it can be made available in an Employee Sale or can be made exclusive to an Employee Sale.

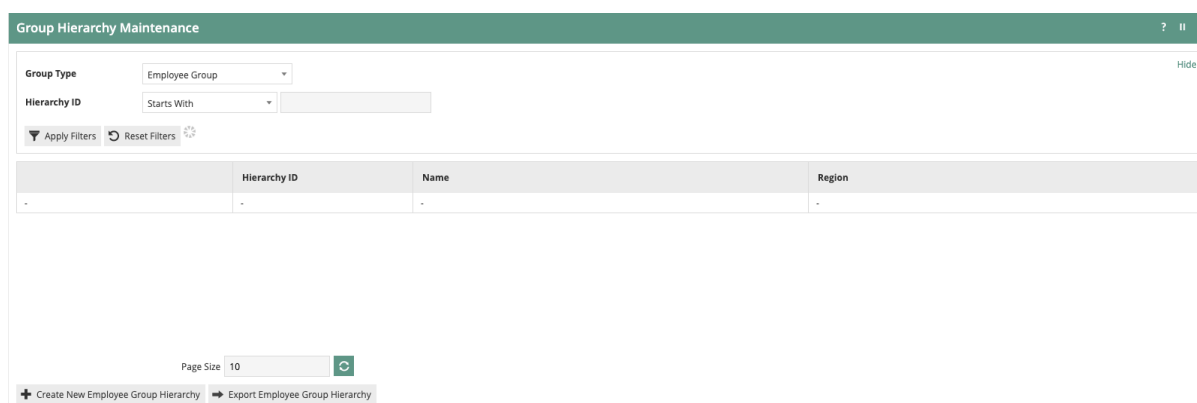


The screenshot shows the 'Promotion Maintenance' application window. At the top, there's a green header bar with the title 'Promotion Maintenance' and icons for help, full screen, and close. Below the header, there are 'Save' and 'Cancel' buttons. A status bar indicates 'You are editing Promotion '11' for Region 'United Kingdom'.'. The main area has a tabbed interface with tabs for General, Item Sets, Transaction, Timetable, Customers, Employees, Tenders, Vouchers, Regions, Fiascas, and Locations. The 'Employees' tab is selected. Under the 'Employees' tab, there are sub-tabs: General, Included Employee Groups, Excluded Employee Groups, Included Employee Grades, and Excluded Employee Grades. The 'General' sub-tab is active, showing three checkboxes: 'Enable this Promotion during Employee Sales' (unchecked), 'Restrict to Employee Sales only' (unchecked), and 'Update Employee Discount Balance with savings' (unchecked).

In the Promotion Maintenance application, navigate to the Employees tab. On the Employees – General tab, select the Enable this Promotion during Employee Sales option to allow the Promotion to apply in an Employee Sale transaction. By selecting the Restrict to Employee Sales only the promotion will only be available in Employee Sale transactions. If the Employee Sale Reason is set to Adjust Balance by Discount, the discount obtained from the Promotion can be added to the balance when the Update Employee Discount Balance with savings option is selected.

Additionally, it is possible to Include or Exclude specific Employee Grades by selecting and adding them on the appropriate tabs. This can also be done by Employee Groups. The configuration of Employee Groups is reviewed below.

The general creation of Groups is discussed in the Organisation Structure guide. To create an Employee Group, navigate to Group Maintenance and select the Employee Group as the Group Type.



The screenshot shows the 'Group Hierarchy Maintenance' application window. It has a green header bar with the title 'Group Hierarchy Maintenance' and icons for help, full screen, and close. Below the header, there are 'Group Type' and 'Hierarchy ID' dropdown menus. The 'Group Type' is set to 'Employee Group' and the 'Hierarchy ID' is set to 'Starts With'. There are 'Apply Filters' and 'Reset Filters' buttons. Below the filters, there is a table with columns: Hierarchy ID, Name, and Region. The table is currently empty. At the bottom, there is a 'Page Size' dropdown set to '10' and a 'Create New Employee Group Hierarchy' button. There is also an 'Export Employee Group Hierarchy' button.

Click on 'Create New Employee Group Hierarchy'.

Group Hierarchy Maintenance ? || x

Please enter an ID for the new Employee Group Hierarchy.

Hierarchy ID

Region

[← Back](#) [+ Create](#)

Enter a Hierarchy ID, select the appropriate Region and then click 'Create'.

Group Hierarchy Maintenance ? || x

[Save](#) [Cancel](#)

You are editing Employee Group hierarchy ID: EMP_GRP, for region: United Kingdom

- EMP_GRP - All Employees
 - EMP_SSC - Central Employees
 - EMP_STOR - Store Employees
 - ST_FT - Store- Full Time
 - ST_PT - Store- Part Time

[Add Employee Group](#) [Edit Employee Group](#)

Use the Add Employee Group function to create the desired Employee Group Hierarchy. Once created, the Employee Group can be set on the Employee Record.

Employee Maintenance ? || x

[Save](#) [Cancel](#)

You are editing Employee ID: '10'

General Address **Groups**

	Employee Group Id	Employee Group Name
	ST_FT	Store- Full Time
+ Add	Central Employees	

In Employee Maintenance, select the desired Employee and navigate to the Groups tab. Select the desired Employee Group from the dropdown and click 'Add'. Repeat until all applicable groups have been added.

Product Restrictions

Using the Employee Grade by MMG Discount Type variants allow some control over what products are eligible for Employee Sales. In many cases, it may be more practical to simply exclude specific items from being discounted in an Employee Sale which can be done in Product Maintenance.

The screenshot shows the 'Product Maintenance' window for SKU Product KD092JS-1: Nike Capri Trainer. The 'Restrictions' tab is selected under the 'Selling Options' category. The following table lists the restriction options and their current status:

Restriction	Status
Allow Returns	<input checked="" type="checkbox"/>
Allow Discounts	<input checked="" type="checkbox"/>
Allow Promotions	<input checked="" type="checkbox"/>
Allow Employee Discounts	<input checked="" type="checkbox"/>
Allow Tax Changes	<input type="checkbox"/>
Allow Zero Price	<input checked="" type="checkbox"/>
Allow Price Overrides	<input checked="" type="checkbox"/>
Require Message Acknowledgement	<input type="checkbox"/>
Prevent Store Transaction	<input type="checkbox"/>
Disallow Quantity Entry	<input type="checkbox"/>
Perishable	<input type="checkbox"/>

After finding and selecting the Product in Product Maintenance, select the Selling Options – Restrictions tab. Deselect the Allow Employee Discounts option to prevent discounts during an Employee Sale.

About This Document

©2020 Enactor Ltd

All documents produced by Enactor Ltd are supplied to customers subject to Copyright, commercial confidentiality and contractual agreements and must not be copied or transferred without permission.

The amendment history of this document can be found in the table below.

Current Document Version information

Document Version 1.0

Product Version 2.6

Document Context

This document is part of the Enactor Product Documentation Series. All Enactor products include a comprehensive documentation set designed to improve understanding of the product and facilitate ease of use.

Document Inquiries

At Enactor we aspire to producing the highest quality documentation to reflect and enhance the quality of our product. If you find that the document is inaccurate or deficient in any way, please assist us in improving our standard by letting us know.

For matters of document quality or any other inquiries regarding this document please contact:

By Email: documentation@enactor.co.uk

Document History

The following versions of the document have been produced:

VERSION	STATUS	ISSUE DATE	AUTHOR	REASON FOR ISSUE
1.0	Initial Draft	12/03/2021	Michael Tolson	Initial version