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Retail Management

Apart for regular modules eg sales, purchase, Warehouse and accounting , Retail industry has some peculiar business activities as follows:

- 1) Loyalty Management – Redeemable points management
- 2) Gift voucher issue / redemption
- 3) Product promotional schemes

Above tools are used to retain customer base.

Retails Management module includes above mentioned activities

1. Introduction to Loyalty Management Module

In marketing generally and in retailing more specifically, a loyalty card, rewards card, points card, advantage card, or club card is a plastic or paper card, visually similar to a credit card or debit card, that identifies the card holder as a member in a loyalty program..

Such Loyalty cards are also known as Reward Cards or Points Card. Such cards are used to provide Redeemable points earned against the purchases. Earned points can be redeemed against the future purchase for equivalent amount.

This document will elaborate the functionality of Redeemable Points management system in retail industry. It covers following process :

- Registered Customer Registration
- Redeemable Points Allocation Management
- Points Redemption Scheme
- Keeping Track of points earned, redeemed and balance point

We will see the functionality of the **Points Management Module** in details as follows :

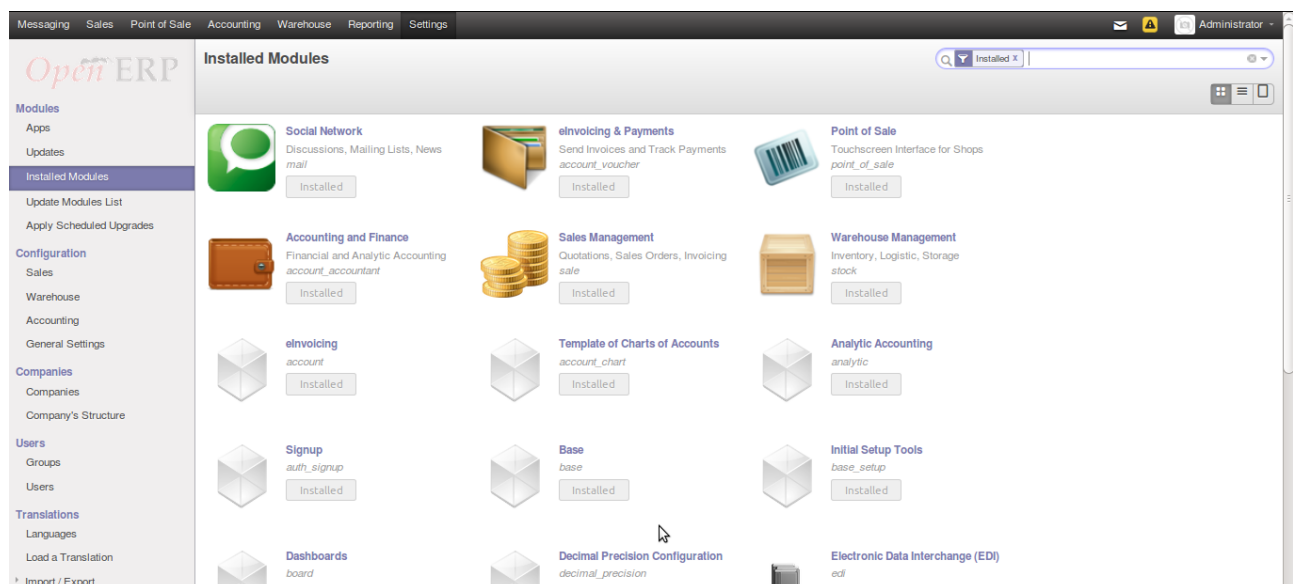
2. Points Scheme Management Configuration

There are 2 main parts to define **Redeemable Points Management Schemes** as follows.

Points Scheme Management : This will allow user to create user defined points scheme for customers. These schemes can be defined for specific date range and that too on total bill amount or on each product category. This part basically handles allocation of no. of points on specified bill amount or quantity of each product.

Points Redemption Scheme : This will facilitate the customer to redeem earned points during their next purchases. User can define parameter for currency discount equivalent to no. of points redeemed.

There are some of the standard modules of OpenERP like Sales, Warehouse, Accounting, POS & Setting are also incorporated. Each module takes care of Sales Management, Inventory Control, Accounts, POS Orders and User Access Definition respectively.



There are some basic configuration forms we need to understand first as follows :

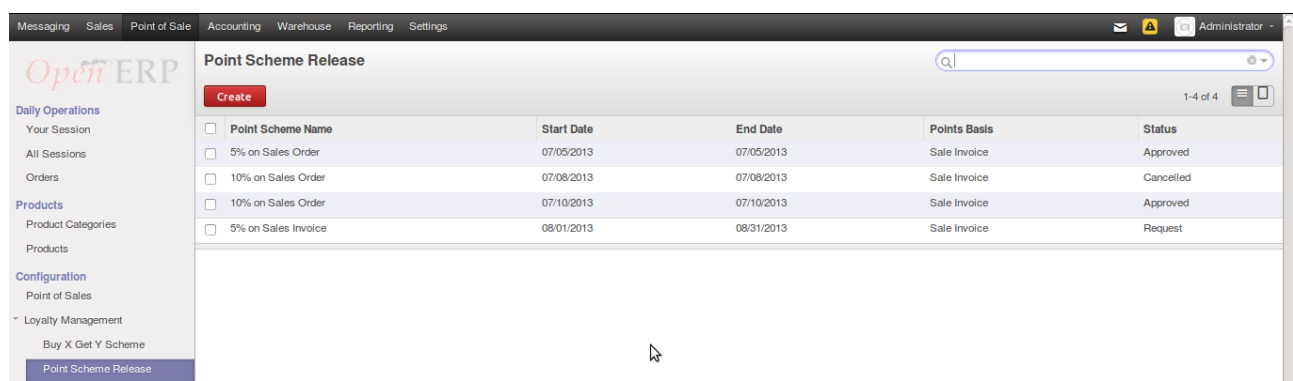
2.1 Points Scheme Release

Path : Point Of Sale → Configuration → Loyalty Management → Points Scheme Release

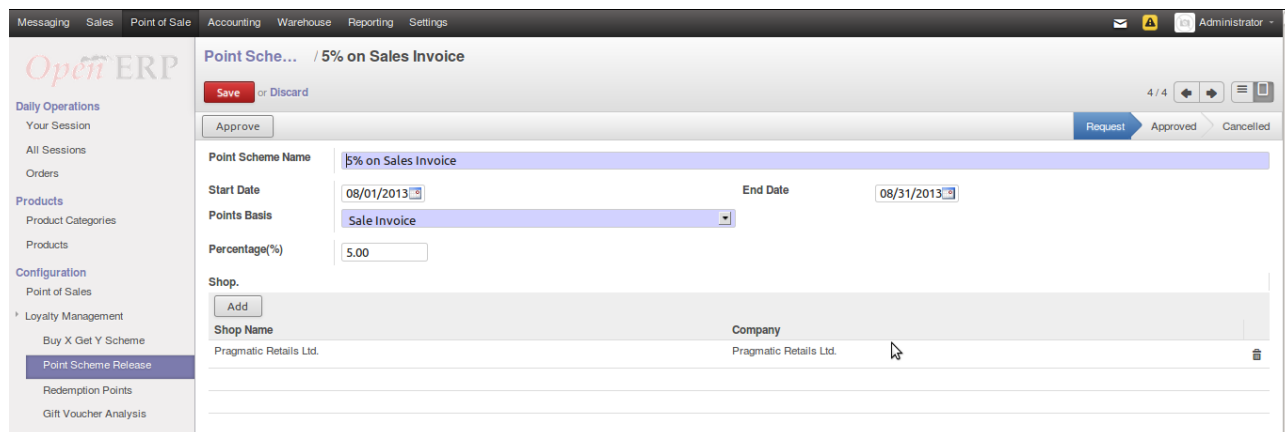
Points Scheme Release allows user to defined different points earning scheme between different date span. Points scheme can be made applicable in two was as follows

A) On Sales Invoice

B) Points/ Product/ Product Category



Click on one of the record to see the details captured in this configuration form :



Open ERP

Point Scheme... / 5% on Sales Invoice

Save or Discard

Approve

Request Approved Cancelled

Point Scheme Name: 5% on Sales Invoice

Start Date: 08/01/2013

End Date: 08/31/2013

Points Basis: Sale Invoice

Percentage(%): 5.00

Shop:

Add

Shop Name	Company
Pragmatic Retails Ltd.	Pragmatic Retails Ltd.

Points Scheme Name : This is a user character field to define Points Scheme Name.

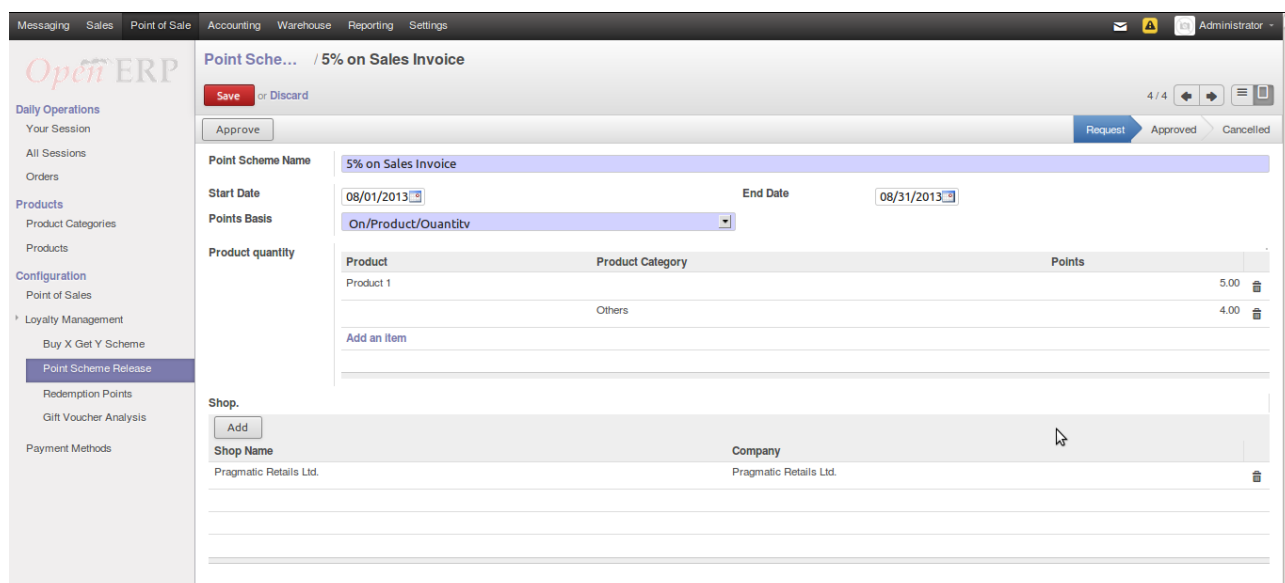
Start Date : This is a date field from which given Points scheme shall be made applicable

End Date : It is a date field to indicate the end of Points scheme computation. In other words points scheme shall be active for date range only. Similarly two points schemes can not be created in overlapping date range.

Points Basis : It is a Many 2 One field with two options to define basis of Points computation.

A) On Sales Invoice : With this option system will compute redeemable points based on Sales Invoice amount. It will be computed based on certain percentage provided by the end user.

B) on/Product/Quantity : With this option system will compute redeemable points based on per quantity purchase of specific products or product category.



Open ERP

Point Scheme... / 5% on Sales Invoice

Save or Discard

Approve

Request Approved Cancelled

Point Scheme Name: 5% on Sales Invoice

Start Date: 08/01/2013

End Date: 08/31/2013

Points Basis: On/Product/Quantity

Product quantity

Product	Product Category	Points
Product 1		5.00
	Others	4.00

Add an item

Shop:

Add

Shop Name	Company
Pragmatic Retails Ltd.	Pragmatic Retails Ltd.

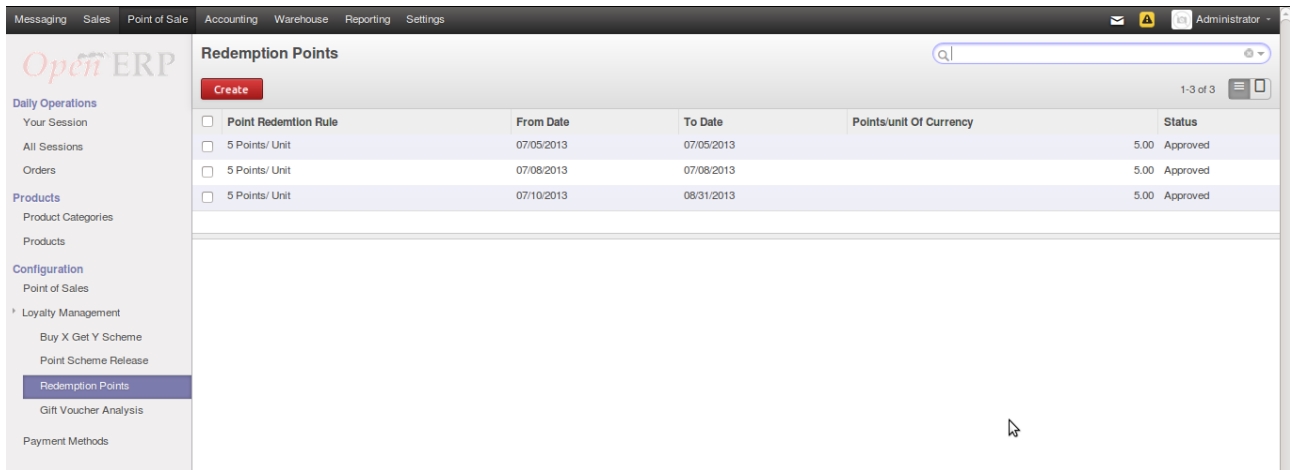
User can define per product/ Product Category wise points earnings.

Shop: This scheme shall be made applicable in specific Shop(s)or Branch(s).

2.2 Points Redemption

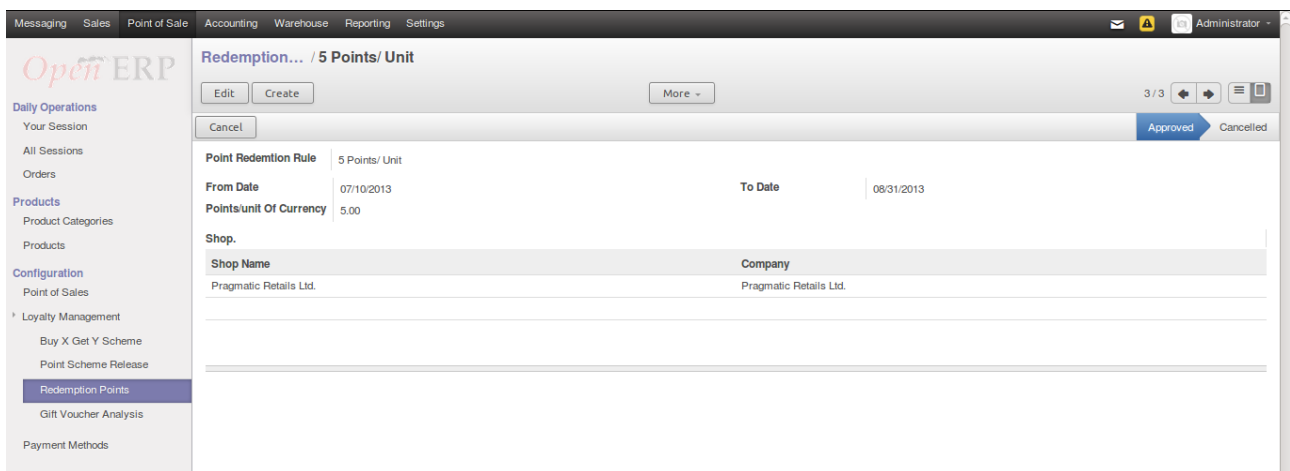
Path : Point of Sales → Configurations → Loyalty Management → Points Redemption

This will facilitate to define points redemption rule. User can define no. of points equivalent to one unit of currency. System will compute amount to be discounted from the bill amount based on no. of points redeemed.



Point Redemption Rule	From Date	To Date	Points/unit Of Currency	Status
<input type="checkbox"/> 5 Points/ Unit	07/05/2013	07/05/2013	5.00	Approved
<input type="checkbox"/> 5 Points/ Unit	07/08/2013	07/08/2013	5.00	Approved
<input type="checkbox"/> 5 Points/ Unit	07/10/2013	08/31/2013	5.00	Approved

Click on one of the record in order to view details captured in this form:



Point Redemption Rule	5 Points/ Unit		
From Date	07/10/2013	To Date	08/31/2013
Points/unit Of Currency	5.00		
Shop.			
Shop Name		Company	
Pragmatic Retails Ltd.		Pragmatic Retails Ltd.	

Points Redemption Rule : This is a user character field to define Points Redemption Scheme Name.

Start Date : This is a date field from which given redemption scheme shall be made applicable

End Date : It is a date field to indicate the end of Redemption scheme computation. In other words Redemption scheme shall be active for date range only. Similarly two points schemes can not be created in overlapping date range.

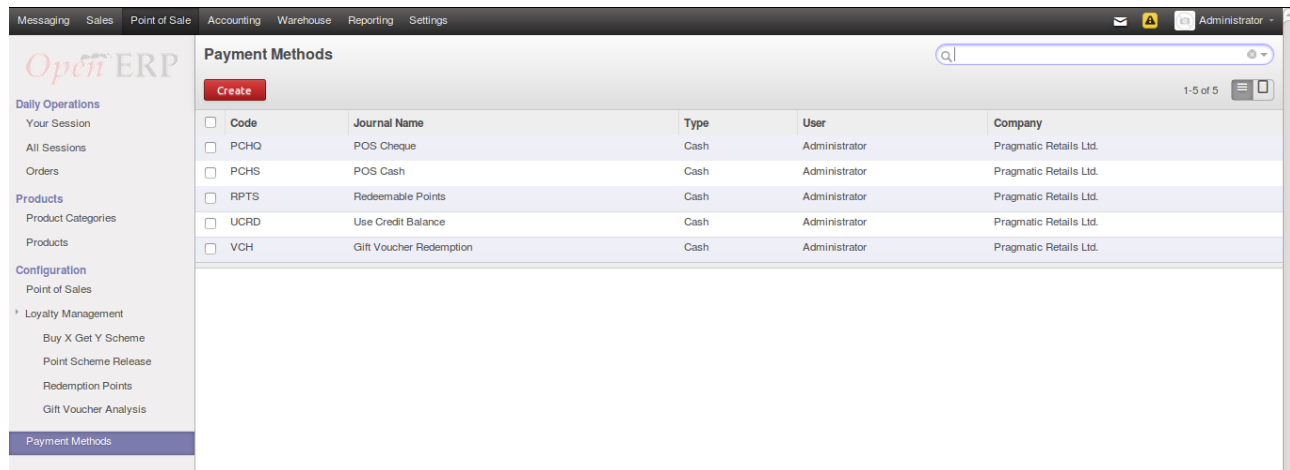
Points/ Unit of Currency : This is an integer field to define no. of points equivalent to one unit of currency.

Shop: This scheme shall be made applicable in specific Shop(s) or Branch(s).

2.3 Payment Methods

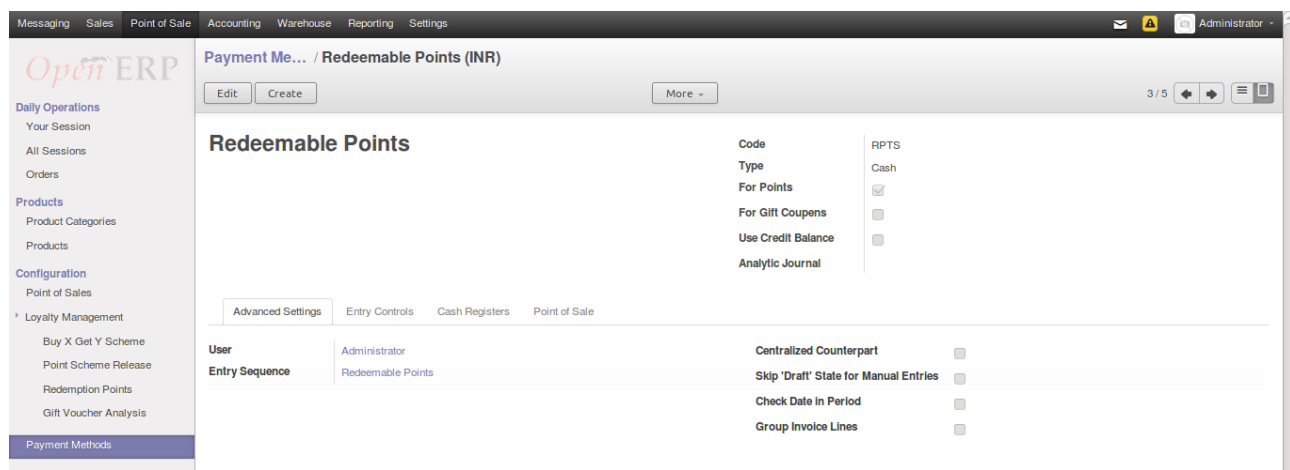
Path : Point Of Sales → Configurations → Payment Methods

User can maintain a list of different payment mode accepted on different billing counters. And can be seen as follows



Code	Journal Name	Type	User	Company
<input type="checkbox"/> PCHQ	POS Cheque	Cash	Administrator	Pragmatic Retails Ltd.
<input type="checkbox"/> PCHS	POS Cash	Cash	Administrator	Pragmatic Retails Ltd.
<input type="checkbox"/> RPTS	Redeemable Points	Cash	Administrator	Pragmatic Retails Ltd.
<input type="checkbox"/> UCRD	Use Credit Balance	Cash	Administrator	Pragmatic Retails Ltd.
<input type="checkbox"/> VCH	Gift Voucher Redemption	Cash	Administrator	Pragmatic Retails Ltd.

Lets go to “Redeemable Points” method to see the changes.



Code	Type	For Points	For Gift Coupons	Use Credit Balance	Analytic Journal
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

User: Administrator
 Entry Sequence: Redeemable Points

Centralized Counterpart: ☐
 Skip 'Draft' State for Manual Entries: ☐
 Check Date in Period: ☐
 Group Invoice Lines: ☐

There are some boolean fields added on this panel as follows:

For Points : When click on such payment methods, system will generate generate additional field on payment screen to capture no. of points to be redeemed, this will compute discount amount to be reduced form total bill amount against points. Accounts posting will be done in accounts linked with such Payment methods.

For Gift Coupons : When click on such payment methods , system will generate generate additional field on payment screen to capture Gift Coupon codes to be redeemed. This will compute discount amount to be reduced form total bill amount against Redeemed Gift Coupon. Accounts posting will be done in accounts linked with such Payment methods.

Use Credit Balance : When click on such payment methods , system will generate generate additional field on payment screen to capture Credit balance of customer to be used in this current bill amount. This will be reduce form total bill amount.

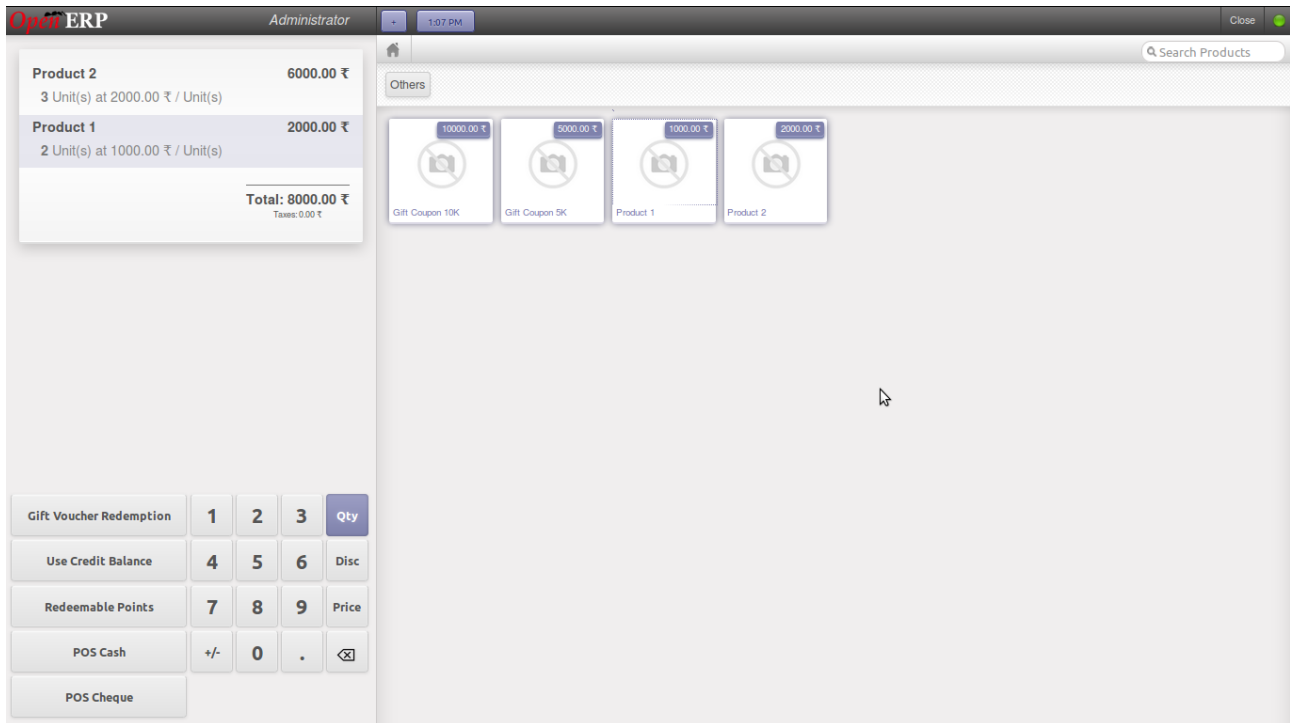
Just link different payment methods to each POS terminal through “Point of Sales” menu in Configuration.

3. POS Transactions

Path : Point Of Sales → Daily Operations → Your Session

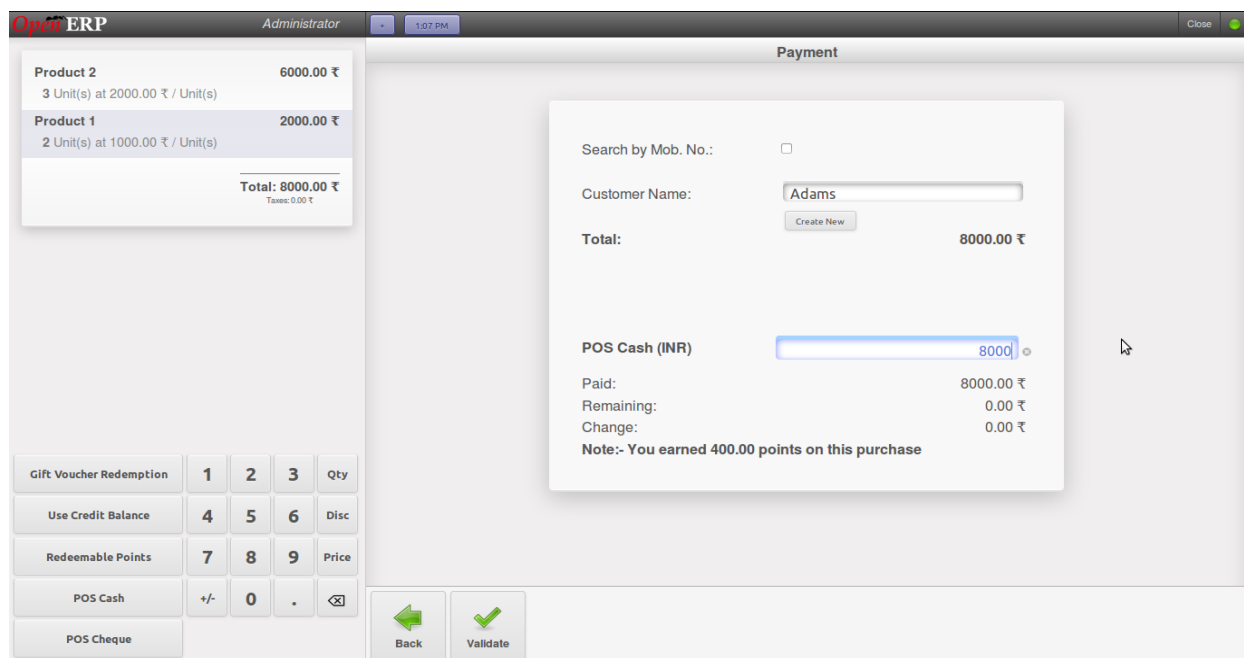
With this for user can sellout products using POS screen. Each user will have dedicated POS terminal. User will have to create new session to sale products.

3.1 Points Earning



The screenshot shows the OpenERP POS interface. On the left, there is a list of products: Product 2 (3 Unit(s) at 2000.00 ₹ / Unit(s)) and Product 1 (2 Unit(s) at 1000.00 ₹ / Unit(s)). The total is 8000.00 ₹. Below the product list is a numeric keypad with buttons for 'Gift Voucher Redemption', 'Use Credit Balance', 'Redeemable Points', 'POS Cash', and 'POS Cheque'. The main area displays a grid of product tiles, including 'Gift Coupon 10K', 'Gift Coupon 5K', 'Product 1', and 'Product 2'. A search bar is visible at the top right.

Click on “POS Cash” payment method in order to receive payment.



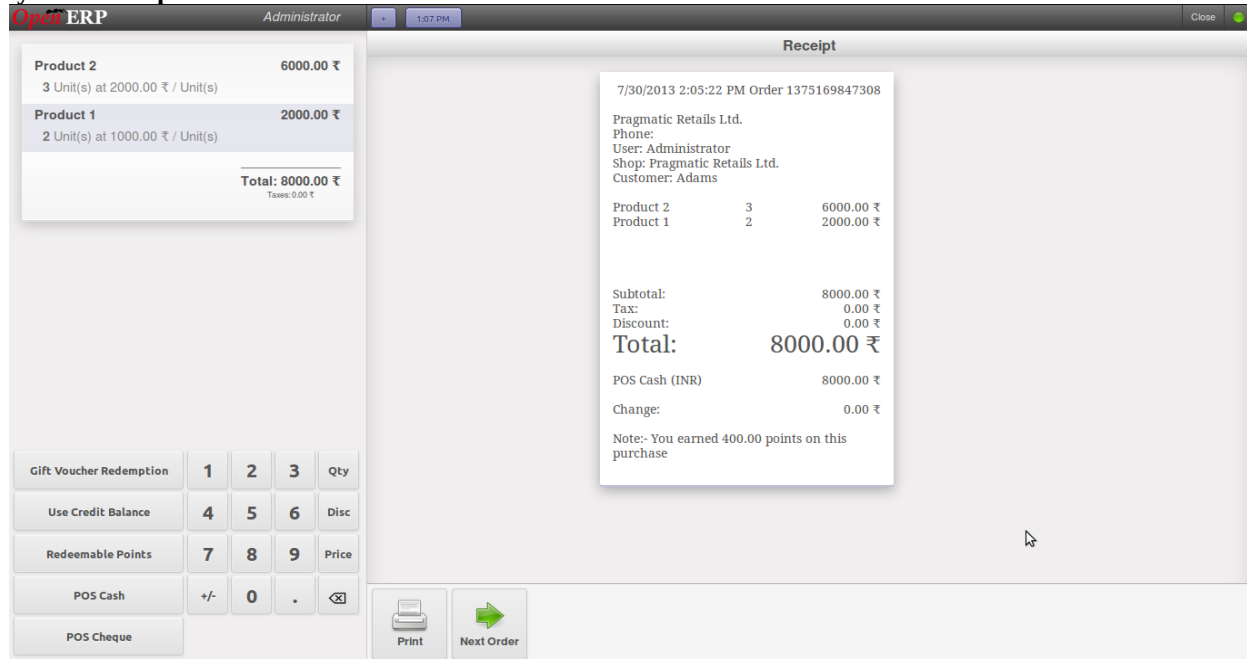
The screenshot shows the OpenERP POS interface with the 'Payment' modal open. The modal contains fields for 'Search by Mob. No.', 'Customer Name' (Adams), and 'Total' (8000.00 ₹). Below these, there is a 'POS Cash (INR)' field with a value of 8000. Below the payment amount, it shows 'Paid: 8000.00 ₹', 'Remaining: 0.00 ₹', and 'Change: 0.00 ₹'. A note at the bottom states: 'Note:- You earned 400.00 points on this purchase'. The background shows the same product list and numeric keypad as the previous screenshot.

Based on the configuration made for Points release system will show message at the bottom of payment screen and

same is printed on payment receipt and the points will be accounted against selected customer name. Points earned shall be computed based on Points Scheme Release.

If customer name is not provided then such points shall not be taken in to account.

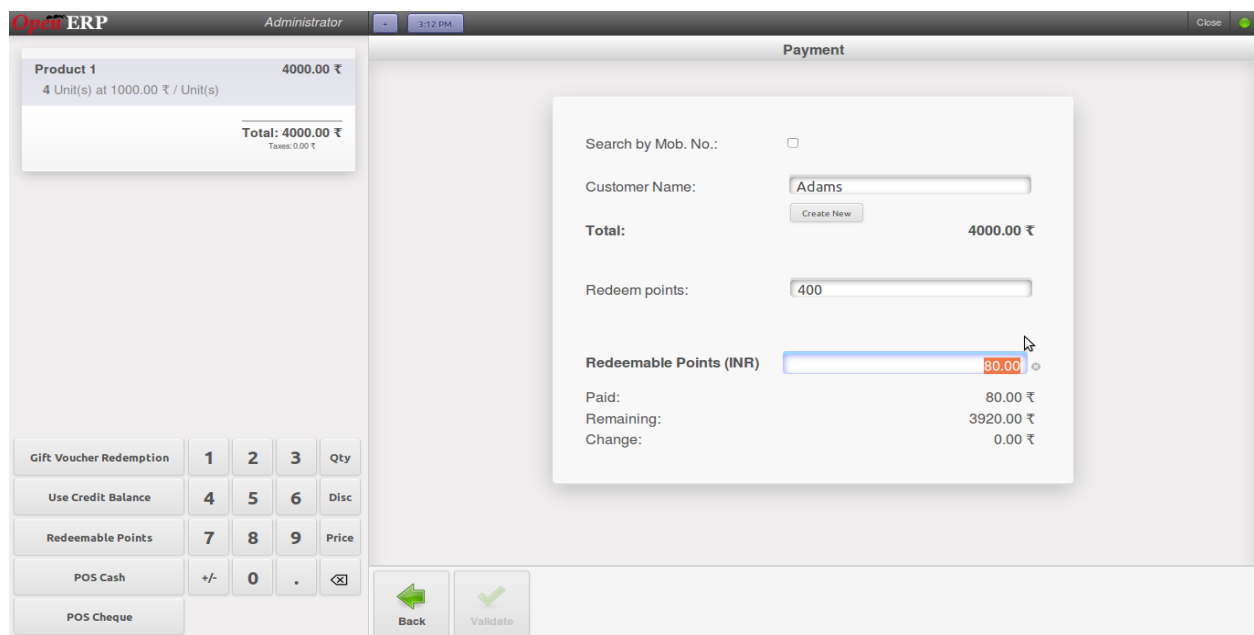
Payment Receipt :



3.2 Points Redemption

Now 400 points have been linked with “Adams”. Adams can redeemed such points from in future purchases.

Let's create one more POS order where we will redeem some of the points in new purchases. and click on “Redeemable Points” payment method. Following screen will appear on the screen.



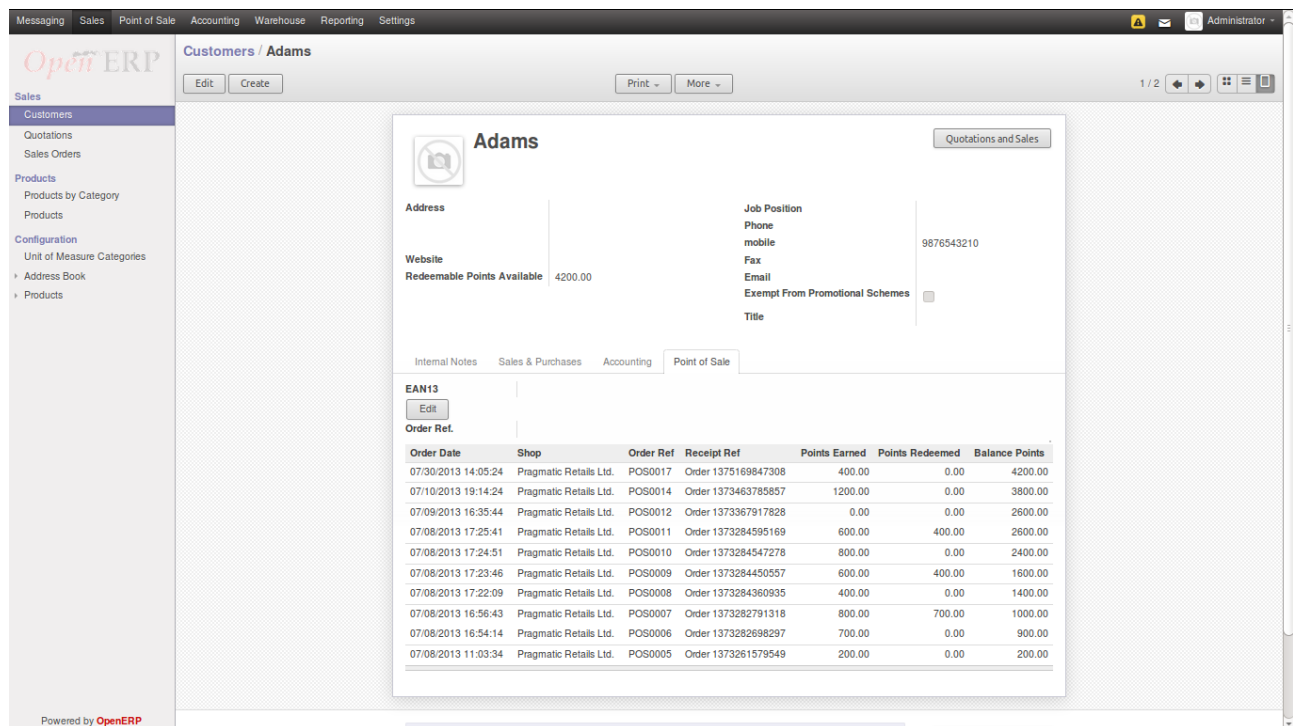
User will have to provide points to be redeemed for this transaction. And system will compute equivalent amount.

Rest amount can be paid in any other payment method as “Cash”, “Cheque” etc.

3.3 Customer wise Points Tracking

Path : Sales → Customers

System maintains track of customer wise transaction in order to calculate Closing balance of redeemable points. User can view transaction wise log in Customer Partner as follows:



Customers / Adams

Adams

Address

Website

Redeemable Points Available 4200.00

Job Position

Phone

mobile 9876543210

Fax

Email

Exempt From Promotional Schemes ☐

Title

Internal Notes **Sales & Purchases** **Accounting** **Point of Sale**

EAN13

Edit

Order Ref.

Order Date	Shop	Order Ref	Receipt Ref	Points Earned	Points Redeemed	Balance Points
07/30/2013 14:05:24	Pragmatic Retails Ltd.	POS0017	Order 1375169847308	400.00	0.00	4200.00
07/10/2013 19:14:24	Pragmatic Retails Ltd.	POS0014	Order 1373463785857	1200.00	0.00	3800.00
07/09/2013 16:35:44	Pragmatic Retails Ltd.	POS0012	Order 1373367917828	0.00	0.00	2600.00
07/08/2013 17:25:41	Pragmatic Retails Ltd.	POS0011	Order 1373284595169	600.00	400.00	2600.00
07/08/2013 17:24:51	Pragmatic Retails Ltd.	POS0010	Order 1373284547278	800.00	0.00	2400.00
07/08/2013 17:23:46	Pragmatic Retails Ltd.	POS0009	Order 1373284450557	600.00	400.00	1600.00
07/08/2013 17:22:09	Pragmatic Retails Ltd.	POS0008	Order 1373284360935	400.00	0.00	1400.00
07/08/2013 16:56:43	Pragmatic Retails Ltd.	POS0007	Order 1373282791318	800.00	700.00	1000.00
07/08/2013 16:54:14	Pragmatic Retails Ltd.	POS0006	Order 1373282698297	700.00	0.00	900.00
07/08/2013 11:03:34	Pragmatic Retails Ltd.	POS0005	Order 1373261579549	200.00	0.00	200.00

Powered by **OpenERP**

4. Introduction to Gift Coupon Management Module

In Retail industry now a days we do have trend that people do prefer to procure “Gift Coupons” from shop that actually giving Hard Cash as a gift on various occasion. Using Gift Coupons appears more handy in terms of transaction without hassle.

Retail shop may have preprinted gift coupons as well as runtime generated gift coupons, with different currency denominations.

Following are the steps involved in Gift Coupon Management system

- Gift Coupon Issue
- Gift Coupon Redemption

We will see the functionality of the **Gift Coupon Management Module** in details as follows :

5. Gift Coupon Management Configuration

There are 2 main parts to define **Gift Coupon Management** as follows.

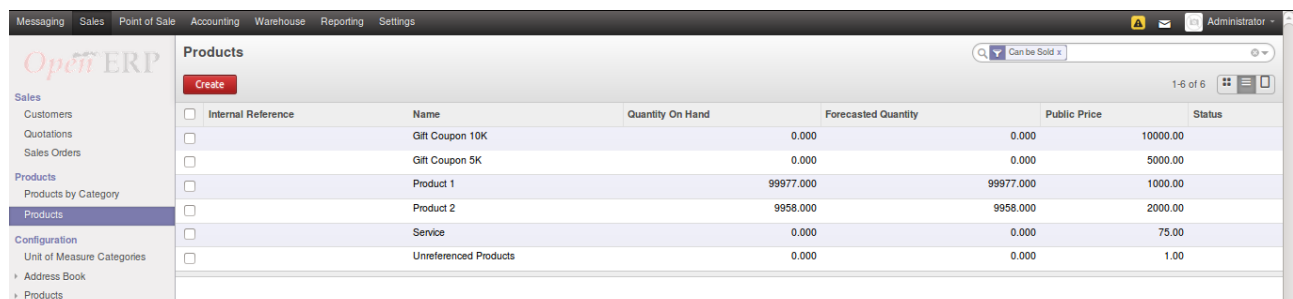
Gift Coupon Issue : This will allow user to to sell multiple Gift Coupons with unique barcode to each Gift Coupon.

Gift Coupon Redemption : This will facilitate customer to redeem their purchased Gift Coupons .

5.1 Gift Coupon Definition

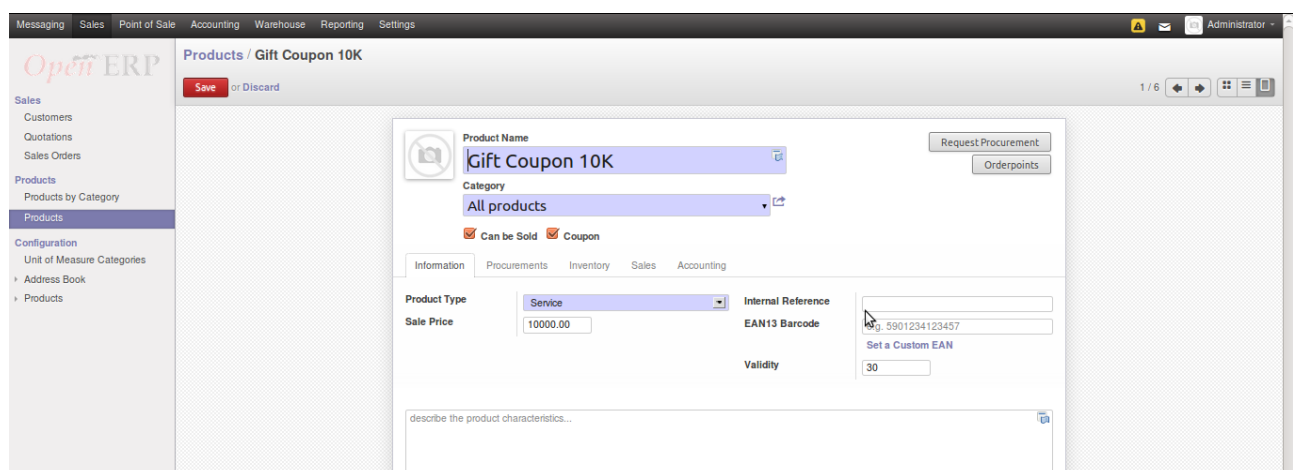
Path : Point Of Sale → Products → Products

In this system Gift Coupons are treated as service products. User can defined Sales Price for such gift coupon. We have created couple of Gift Coupons “Gift Coupon 10K” & “Gift Coupon 5K”



Internal Reference	Name	Quantity On Hand	Forecasted Quantity	Public Price	Status
<input type="checkbox"/>	Gift Coupon 10K	0.000	0.000	10000.00	
<input type="checkbox"/>	Gift Coupon 5K	0.000	0.000	5000.00	
<input type="checkbox"/>	Product 1	99977.000	99977.000	1000.00	
<input type="checkbox"/>	Product 2	9958.000	9958.000	2000.00	
<input type="checkbox"/>	Service	0.000	0.000	75.00	
<input type="checkbox"/>	Unreferenced Products	0.000	0.000	1.00	

Click on one of the record to see the details captured in this Product form :



Products / Gift Coupon 10K

Product Name: Gift Coupon 10K

Category: All products

☒ Can be Sold ☒ Coupon

Product Type: Service

Sale Price: 10000.00

Internal Reference:

EAN13 Barcode: 5901234123457

Validity: 30

Buttons: Request Procurement, Orderpoints

Fields: Set a Custom EAN

Description: describe the product characteristics...

In order to treat product as a Gift Coupon user will have to set boolean field as “Gift Coupon”. This will set product

type to “Service”.

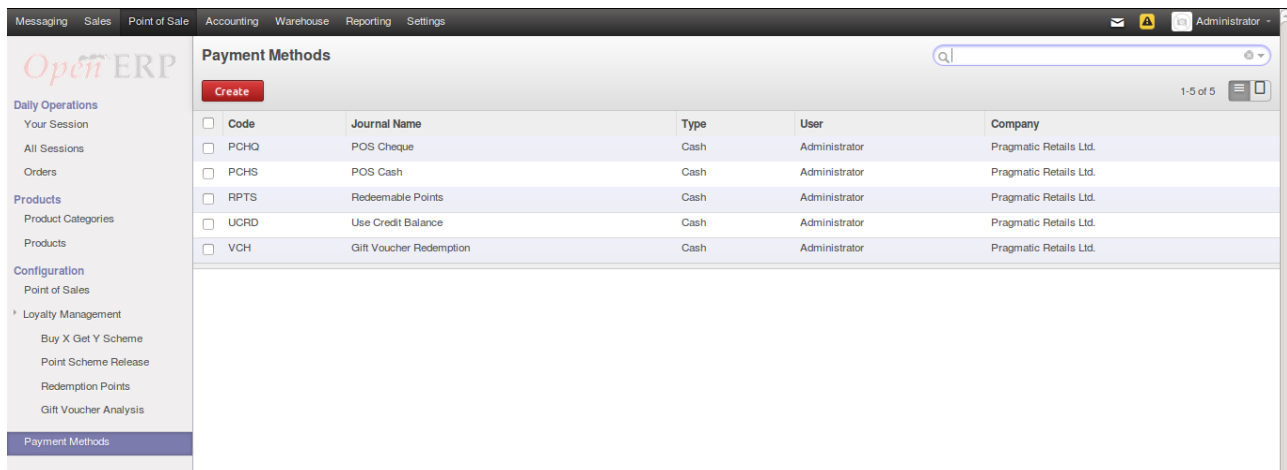
Validity : This is an integer field to indicate validity days from the date of sell of each gift voucher.

Rest fields in product master are remained as it is.

5.2 Payment Method Configurations

Path : Point Of Sales → Configurations → Payment Methods

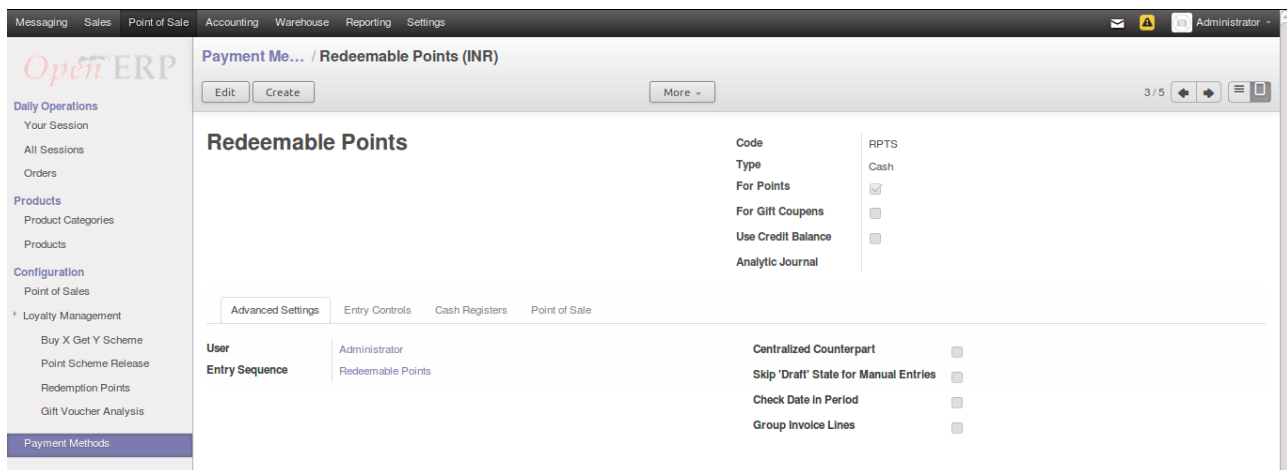
User can maintain a list of different payment mode accepted on different billing counters and can be seen as follows



The screenshot shows the 'Payment Methods' configuration screen in Open ERP. The left sidebar contains navigation links for Daily Operations, Products, and Configuration. The main area displays a table of payment methods with columns for Code, Journal Name, Type, User, and Company. A 'Create' button is visible at the top left of the table.

Code	Journal Name	Type	User	Company
<input type="checkbox"/> PCHQ	POS Cheque	Cash	Administrator	Pragmatic Retails Ltd.
<input type="checkbox"/> PCHS	POS Cash	Cash	Administrator	Pragmatic Retails Ltd.
<input type="checkbox"/> RPTS	Redeemable Points	Cash	Administrator	Pragmatic Retails Ltd.
<input type="checkbox"/> UCRD	Use Credit Balance	Cash	Administrator	Pragmatic Retails Ltd.
<input type="checkbox"/> VCH	Gift Voucher Redemption	Cash	Administrator	Pragmatic Retails Ltd.

Lets go to “Redeemable Points” method to see the changes



The screenshot shows the 'Redeemable Points' configuration screen in Open ERP. The left sidebar contains navigation links for Daily Operations, Products, and Configuration. The main area displays a form for configuring the 'Redeemable Points' method, including fields for Code, Type, For Points, For Gift Coupons, Use Credit Balance, and Analytic Journal. There are also checkboxes for 'Centralized Counterpart', 'Skip 'Draft' State for Manual Entries', 'Check Date in Period', and 'Group Invoice Lines'.

Code	Type	For Points	For Gift Coupons	Use Credit Balance	Analytic Journal
RPTS	Cash	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

There are some boolean fields added on this panel as follows :

For Points : When click on such payment methods, system will generate generate additional field on payment screen to capture no. of points to be redeemed, this will compute discount amount to be reduced form total bill amount against points. Accounts posting will be done in accounts linked with such Payment methods.

For Gift Coupons : When click on such payment methods , system will generate generate additional field on payment screen to capture Gift Coupon codes to be redeemed. This will compute discount amount to be reduced form total bill amount against Redeemed Gift Coupon. Accounts posting will be done in accounts linked with such Payment methods.

Use Credit Balance : When click on such payment methods , system will generate generate additional field on payment screen to capture Credit balance of customer to be used in this current bill amount. This will be reduce form total bill amount.

Just link different payment methods to each POS terminal through “Point of Sales” menu in Configuration.

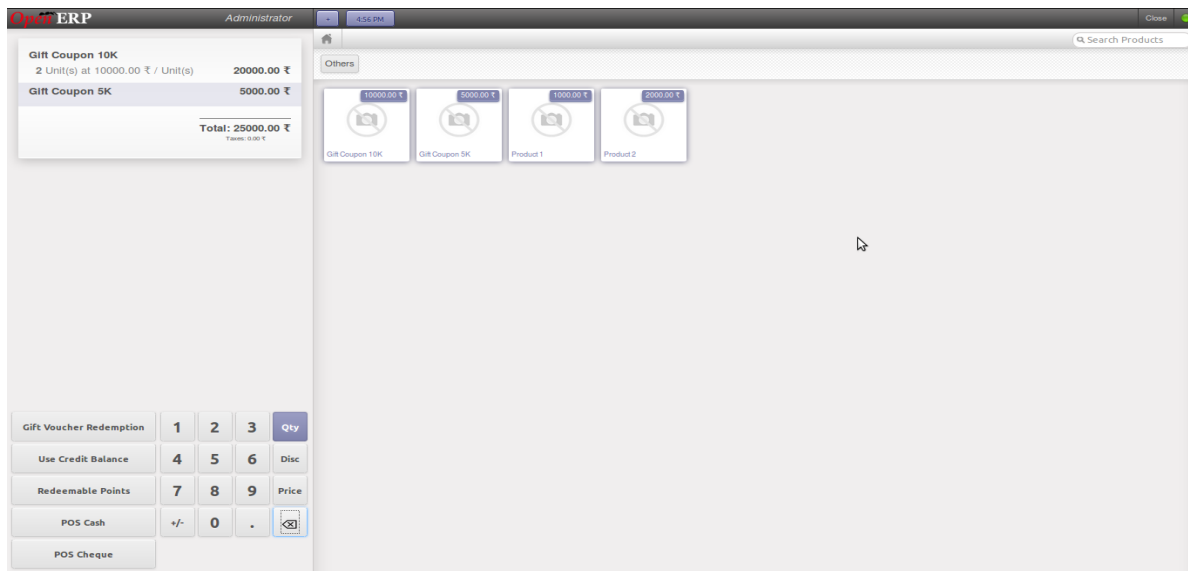
6. POS Transactions

Lets Perform some POS transactions for Gift Coupon Issue and Gift Coupon Redemption

6.1 Gift Coupon Issue

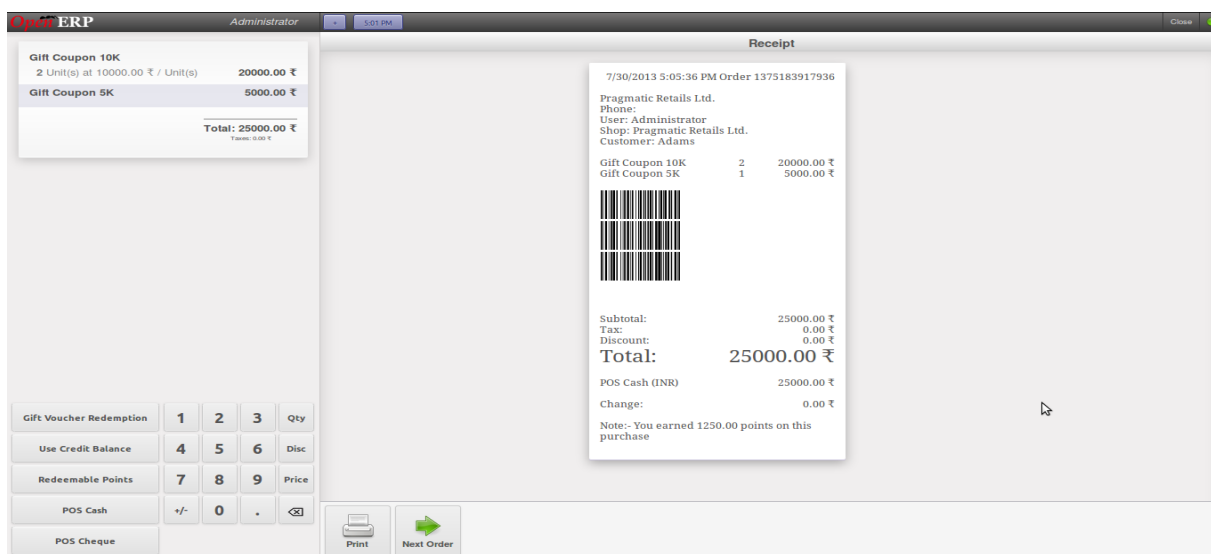
Path : Point of Sales → Daily Operations → Your Session

User can create new session in order to sell products/ gift coupons through POS screen



Here are some of the products and gift coupons listed on RHS panel. Out of which I have selected two Gift Coupons as Gift Coupon 10k with Qty 2 and Gift Coupon 5K with Qty 1.

Assume this sales order is paid by cash as follows

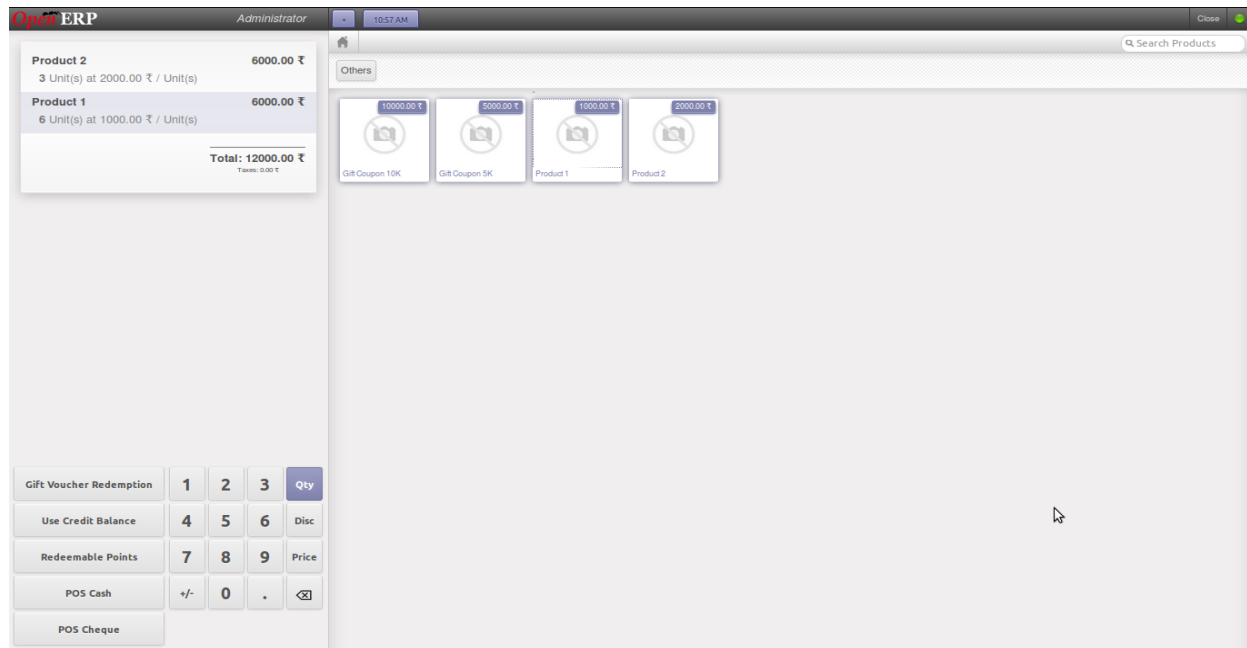


System will generate unique barcode for each of the gift coupon sold. These codes will have validity in no. of as days as defined in product master. These barcodes will be scanned at the time of Gift Coupon redemption.

6.2 Gift Coupon Redemption

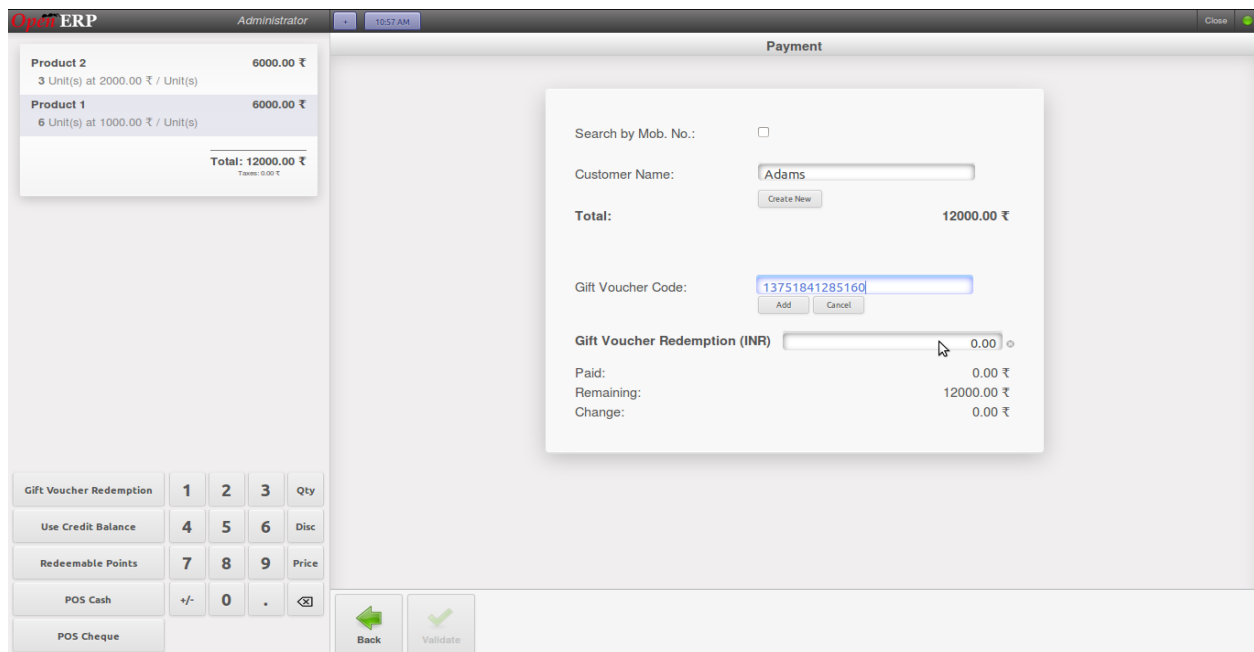
Path : Point Of Sales → Daily Transactions

Let's create one more POS order with purchase of couple of products as follows :



The screenshot shows the OpenERP POS interface. On the left, there is a list of products: Product 2 (3 Unit(s) at 2000.00 ₹ / Unit(s)) and Product 1 (6 Unit(s) at 1000.00 ₹ / Unit(s)). The total amount is 12000.00 ₹. Below the product list, there is a numeric keypad and buttons for 'Gift Voucher Redemption', 'Use Credit Balance', 'Redeemable Points', 'POS Cash', and 'POS Cheque'. On the right, there is a 'Search Products' bar and a grid of gift coupons: Gift Coupon 10K, Gift Coupon 5K, Product 1, and Product 2. The 'Gift Voucher Redemption' button is highlighted.

Now let's assume Mr. Adams wish to redeem his gift coupons against this purchase. So let's click on “Gift Voucher Redemption” payment method. This will bring following screen :



The screenshot shows the OpenERP POS interface with the 'Payment' dialog box open. The dialog box contains the following fields and values:

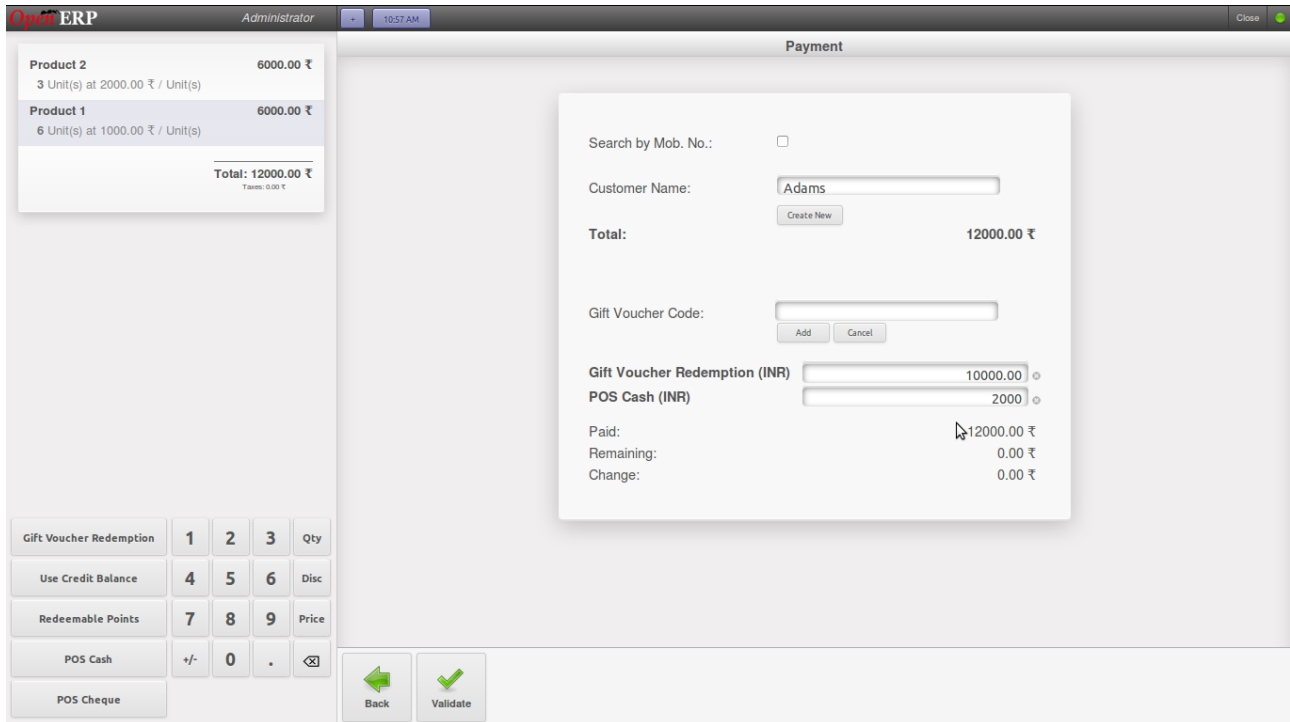
- Search by Mob. No.: ☐
- Customer Name:
- Total: 12000.00 ₹
- Gift Voucher Code:
- Gift Voucher Redemption (INR):
- Paid: 0.00 ₹
- Remaining: 12000.00 ₹
- Change: 0.00 ₹

At the bottom of the dialog box, there are 'Back' and 'Validate' buttons.

User can provide customer name for billing purpose.

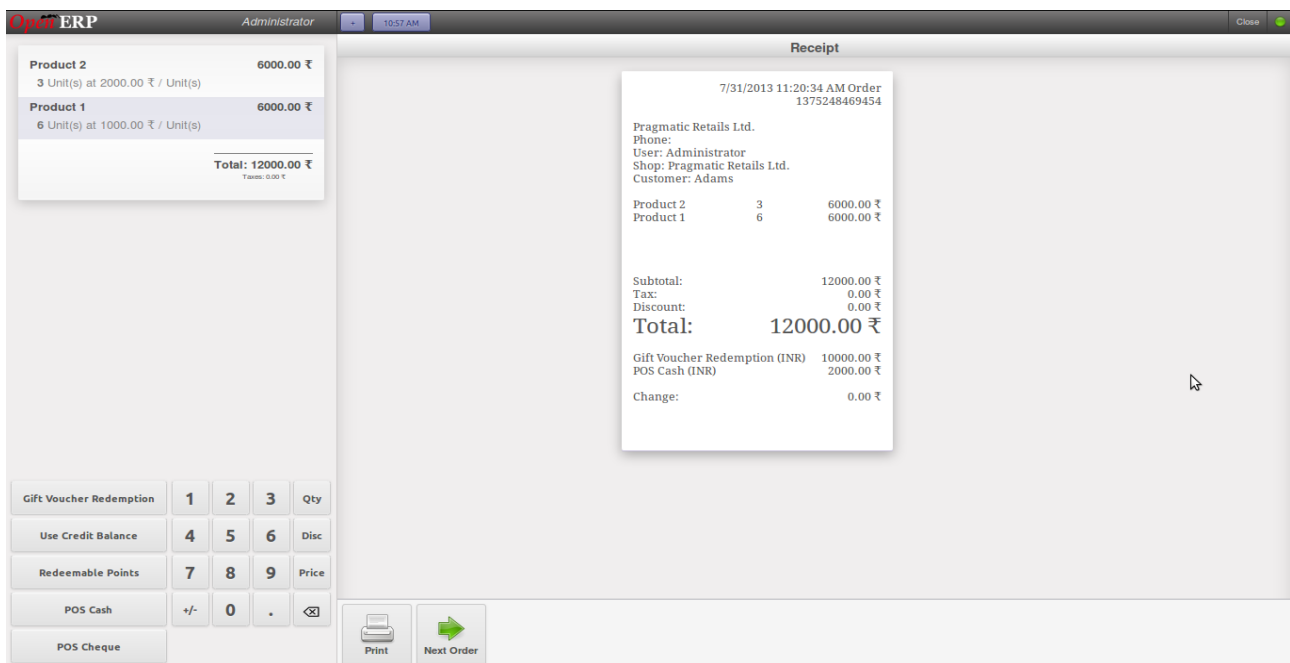
Gift Voucher Code : In this field user will have to scan Gift voucher code and click on add. System will bring corresponding amount in “Gift Voucher Redemption (INR)” field and will get deducted from the total bill amount.

Validations are maintained on gift voucher code in order to avoid unauthorized Gift Voucher Code scan or repeated scan of same Gift Voucher Code.



The screenshot shows the OpenERP POS interface. On the left, a list of products is displayed: Product 2 (3 units at 2000.00 ₹) and Product 1 (6 units at 1000.00 ₹), totaling 12000.00 ₹. The main area shows the Payment dialog box. It includes fields for Customer Name (Adams), Total (12000.00 ₹), Gift Voucher Code, Gift Voucher Redemption (INR) (10000.00 ₹), and POS Cash (INR) (2000.00 ₹). The Paid amount is 12000.00 ₹, and the Remaining and Change amounts are 0.00 ₹. The dialog box has buttons for Search by Mob. No., Create New, Add, Cancel, and a Back button.

System will add up amount for all the scanned Gift Codes and displayed on the screen.



The screenshot shows the OpenERP POS interface. On the left, the same list of products is displayed. The main area shows the Receipt dialog box. It includes fields for Order Date (7/31/2013 11:20:34 AM), Order Number (1375248469454), Shop Name (Pragmatic Retails Ltd.), User (Administrator), and Customer (Adams). The Receipt dialog box also displays the product list, Subtotal (12000.00 ₹), Tax (0.00 ₹), Discount (0.00 ₹), Total (12000.00 ₹), Gift Voucher Redemption (INR) (10000.00 ₹), POS Cash (INR) (2000.00 ₹), and Change (0.00 ₹). The dialog box has buttons for Print and Next Order.

Balance amount can be accepted by other payment methods as Cash or Cheque etc.

6.3 Available Gift Voucher Codes

Path : Point of Sales → Configurations → Loyalty Management → Gift Voucher Analysis

This menu will allow user to check the Sold Vouchers , Redeemed Vouchers, Active Vouchers, Expired Gift Vouchers

Gift Voucher Analysis												
Create												
<input type="checkbox"/>	Source	Shop	Company	Gift Coupon Name	Validity	Creation Date	Expiry Date	Product qty	Product Unit of Measure	Amount	Gift Coupon Serial no.	IN OUT
<input type="checkbox"/>	Order 1373367308952	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 5K	30	07/09/2013	08/08/2013	1.00	Unit(s)	5000.00	13733673135510	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Order 1373367308952	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 10K	30	07/09/2013	08/08/2013	1.00	Unit(s)	10000.00	13733673135510	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Order 1373367612847	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 5K	30	07/09/2013	08/08/2013	1.00	Unit(s)	5000.00	13733676169660	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
<input type="checkbox"/>	Order 1373367612847	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 10K	30	07/09/2013	08/08/2013	1.00	Unit(s)	10000.00	13733676169660	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Order 1373361892615	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 5K	30	07/09/2013	08/08/2013	1.00	Unit(s)	5000.00	13733618996370	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Order 1373361892615	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 10K	30	07/09/2013	08/08/2013	1.00	Unit(s)	10000.00	13733618996370	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Order 1373463687281	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 5K	30	07/10/2013	08/09/2013	1.00	Unit(s)	5000.00	13734636928480	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Order 1373463687281	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 5K	30	07/10/2013	08/09/2013	1.00	Unit(s)	5000.00	13734636928490	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
<input type="checkbox"/>	Order 1373463687281	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 10K	30	07/10/2013	08/09/2013	1.00	Unit(s)	10000.00	13734636928490	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Order 1373463687281	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 10K	30	07/10/2013	08/09/2013	1.00	Unit(s)	10000.00	13734636928490	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Order 1373575195656	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 5K	30	07/11/2013	08/10/2013	1.00	Unit(s)	5000.00	13735752125400	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Order 1375183917936	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 10K	30	07/30/2013	08/29/2013	1.00	Unit(s)	10000.00	13751841285150	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Order 1375183917936	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 10K	30	07/30/2013	08/29/2013	1.00	Unit(s)	10000.00	13751841285160	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
<input type="checkbox"/>	Order 1375183917936	Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Gift Coupon 5K	30	07/30/2013	08/29/2013	1.00	Unit(s)	5000.00	13751841285160	<input type="checkbox"/> <input type="checkbox"/>
										14.00	105000.00	

7. Introduction to Retails Product Promotional Schemes

Product promotional schemes offered in retail industry has great impact on total sales turnover of business. No doubt that promotional schemes offer series of benefits to the industry than any other business communication can.

This module helps user to create different promotional schemes that suits to their business. promotional schemes created in OpenERP shall be utilize in POS module so that billing will be generated based on promotional schemes.

Promotional Schemes can be configured for :

- Specific product category/ products
- Specific date range
- Different locations/ branches

This document will elaborate the functionality of Promotional Schemes Management in retail industry.

8. Promotional Scheme Definition

As said earlier user can define multiple promotional schemes for :

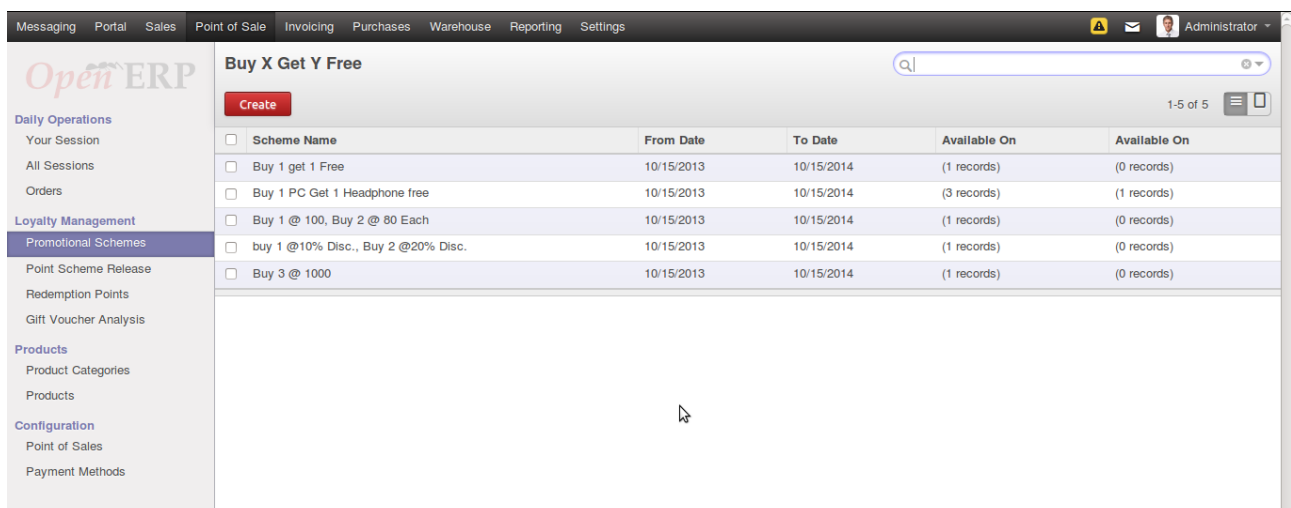
- Specific product category/ products
- Specific date range
- Different locations/ branches

There are some basic configuration forms we need to understand first as follows :

Promotional Scheme Creations

Path : Point Of Sale → Configuration → Loyalty Management → Promotional Schemes

Promotional Scheme allows user to defined different product promotional scheme between different date span.

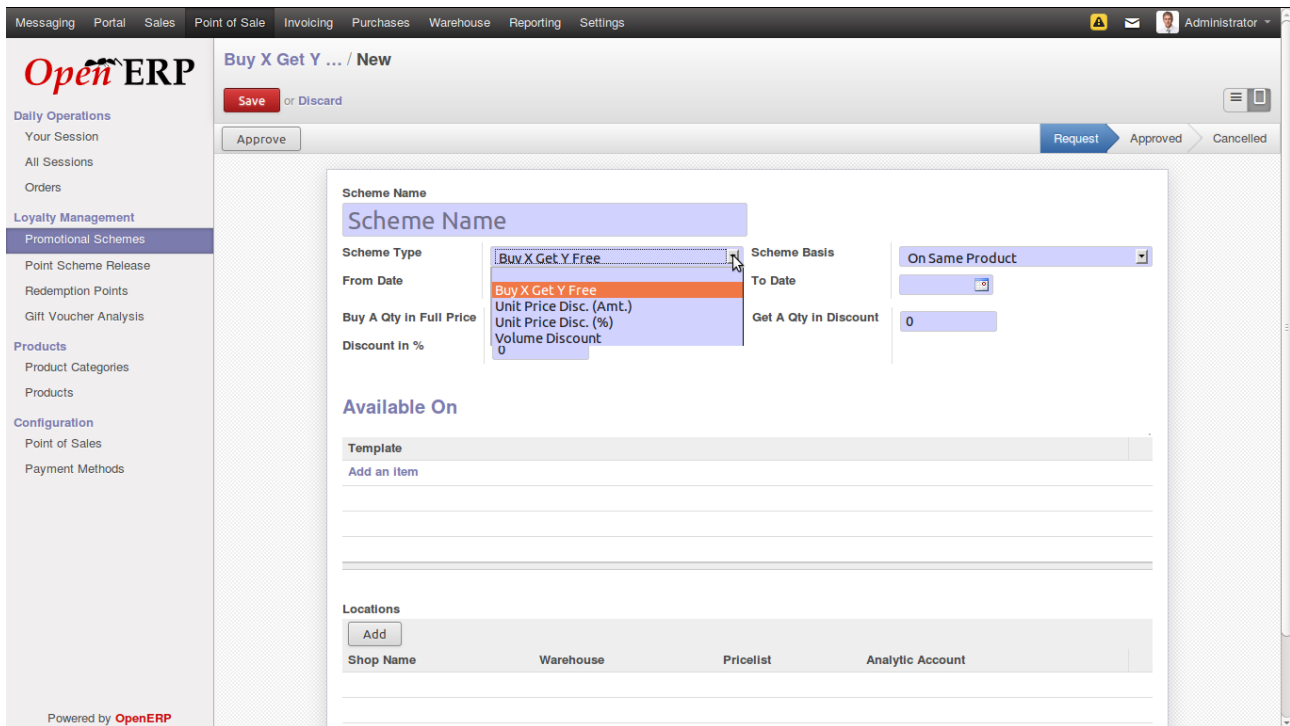


The screenshot shows the OpenERP interface for configuring promotional schemes. The top navigation bar includes: Messaging, Portal, Sales, Point of Sale, Invoicing, Purchases, Warehouse, Reporting, and Settings. The left sidebar menu is categorized into: Daily Operations (Your Session, All Sessions, Orders), Loyalty Management (Promotional Schemes, Point Scheme Release, Redemption Points, Gift Voucher Analysis), Products (Product Categories, Products), and Configuration (Point of Sales, Payment Methods). The main content area is titled 'Buy X Get Y Free' and features a 'Create' button. Below the button is a table with the following columns: Scheme Name, From Date, To Date, Available On, and Available On. The table contains five rows of promotional schemes:

Scheme Name	From Date	To Date	Available On	Available On
<input type="checkbox"/> Buy 1 get 1 Free	10/15/2013	10/15/2014	(1 records)	(0 records)
<input type="checkbox"/> Buy 1 PC Get 1 Headphone free	10/15/2013	10/15/2014	(3 records)	(1 records)
<input type="checkbox"/> Buy 1 @ 100, Buy 2 @ 80 Each	10/15/2013	10/15/2014	(1 records)	(0 records)
<input type="checkbox"/> buy 1 @10% Disc., Buy 2 @20% Disc.	10/15/2013	10/15/2014	(1 records)	(0 records)
<input type="checkbox"/> Buy 3 @ 1000	10/15/2013	10/15/2014	(1 records)	(0 records)

When click on Create button user can have an option to define Scheme type

There are 4 basic scheme types supported by the system so far as follows :



Scheme Name : This is a text field where user can define promotional scheme name

Scheme Type : This is Many 2 One field indicating fixed scheme type to be linked with given scheme
It contains fixed values Buy X, Get Y Free , Unit Price Disc. (Amt), Unit Price Disc. (%), Voulume Discount etc. User can select any of these as per the requirement

From Date : It is a date from which given promotional scheme shall be made applicable

To Date : It is a date till which given promotional scheme shall be made applicable

Rest field varies based on the Scheme type selected

Lets take examples one by one as follows.

8.1 Buy X, Get Y Free

This method user can offer Y products on discounted prices against the purchase of X products for stipulated quantity.

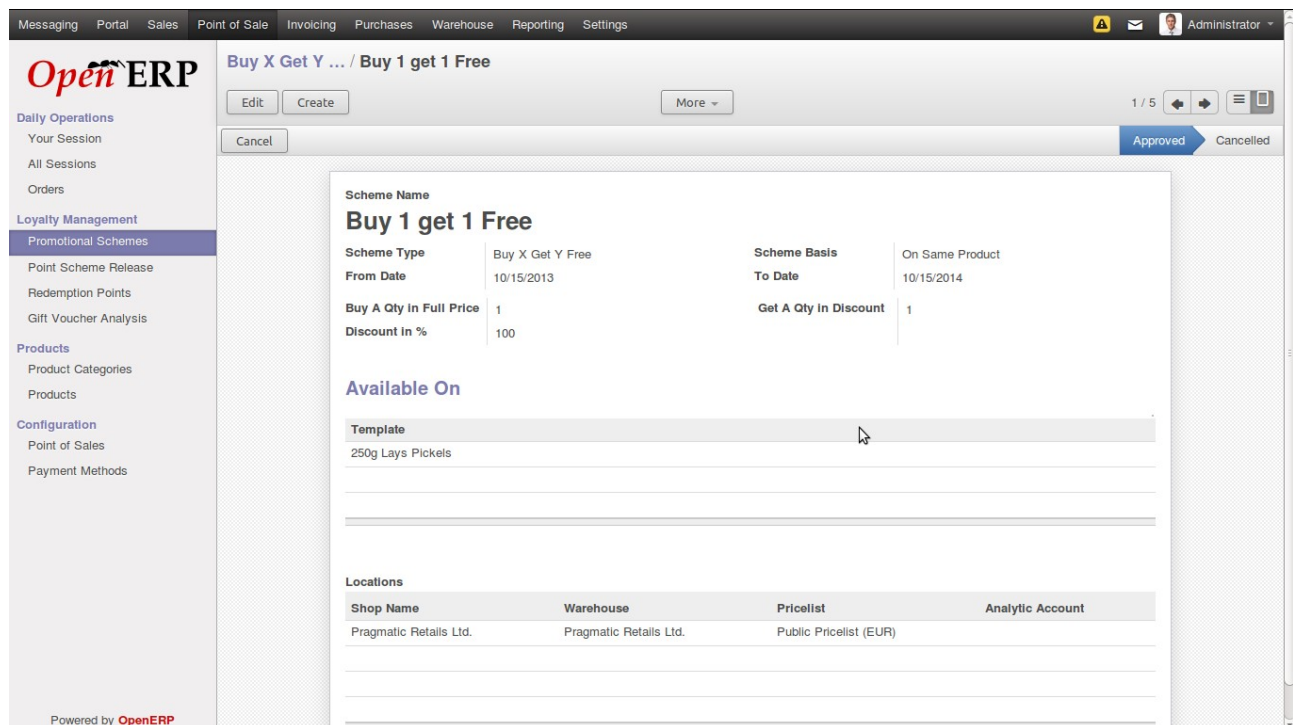
There are two subtypes for this scheme as follows

A. For Same products :

In this case same products are offered at discounted price against purchase of stipulated quantity of products

eg : Buy 1 Pizza Get 1 Free

Buy 3 T-shirt Get 1 Free



The screenshot shows the OpenERP interface for configuring a promotional scheme. The main form is titled 'Buy 1 get 1 Free'. It includes fields for Scheme Name, Scheme Type (Buy X Get Y Free), Scheme Basis (On Same Product), From Date (10/15/2013), To Date (10/15/2014), Buy A Qty In Full Price (1), Discount In % (100), and Get A Qty In Discount (1). Below these fields, there is a section for 'Available On' with a 'Template' dropdown set to '250g Lays Pickels'. At the bottom, there is a table for 'Locations' with columns for Shop Name, Warehouse, Pricelist, and Analytic Account. The table contains one row: Pragmatic Retails Ltd., Pragmatic Retails Ltd., Public Pricelist (EUR), and an empty Analytic Account field.

Scheme Name : This is a text field where user can define promotional scheme name

Scheme Type : This is Many 2 One field indicating fixed scheme type to be linked with given scheme. Here user selects “Buy X, Get Y Free”

Scheme Basis : This field is only activated for “Buy X, Get Y Free” scheme type.

Buy a quantity in full price : This is a quantity that should customer purchase in full amount for a selected product. If user purchase quantities in equal to this then only scheme will be made applicable

B. For Different Products :

In this case discounted prices are offered on Different products that actually procured.

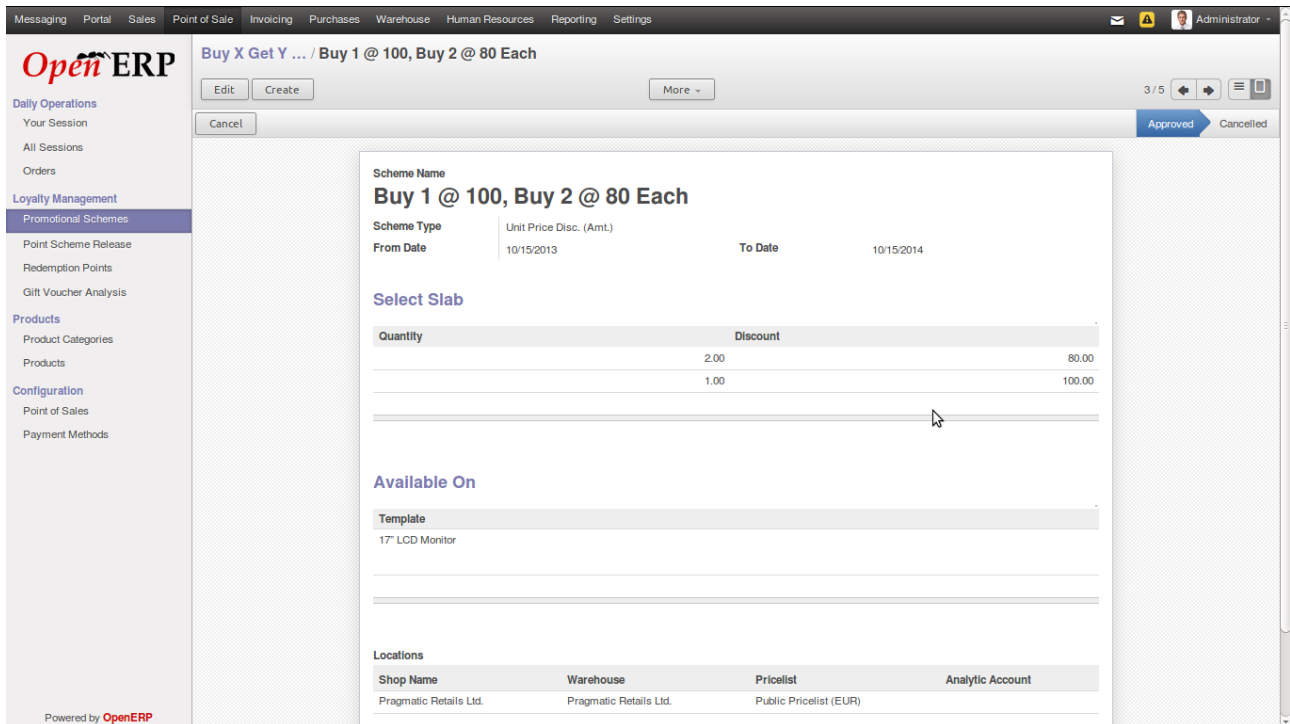
eg : Buy 1 Computer Get 1 Headphone Free

Buy 2 Trousers Get 1 T-shirt Free.

Buy 20 KG Rice and GET 1 Kg of Sugar Free

Get TV Tuner at 50% Disc. with 1 Compaq Laptops

8.2 Unit Price Discount (Amt)



The screenshot shows the OpenERP interface for configuring a promotional scheme. The main window is titled 'Buy X Get Y ... / Buy 1 @ 100, Buy 2 @ 80 Each'. The left sidebar contains navigation menus for 'Daily Operations', 'Loyalty Management', 'Products', and 'Configuration'. The 'Promotional Schemes' menu is selected. The main content area displays the following details:

- Scheme Name:** Buy 1 @ 100, Buy 2 @ 80 Each
- Scheme Type:** Unit Price Disc. (Amt.)
- From Date:** 10/15/2013
- To Date:** 10/15/2014
- Select Slab:** A table with two rows:

Quantity	Discount
2.00	80.00
1.00	100.00
- Available On:** A section with a 'Template' field containing '17" LCD Monitor'.
- Locations:** A table with four columns: Shop Name, Warehouse, Pricelist, and Analytic Account. The data row shows 'Pragmatic Retails Ltd.' for Shop Name and Warehouse, and 'Public Pricelist (EUR)' for Pricelist.

Though this method user can offer quantity wise unit price discount for selected product

Scheme Name : This is a text field where user can define promotional scheme name

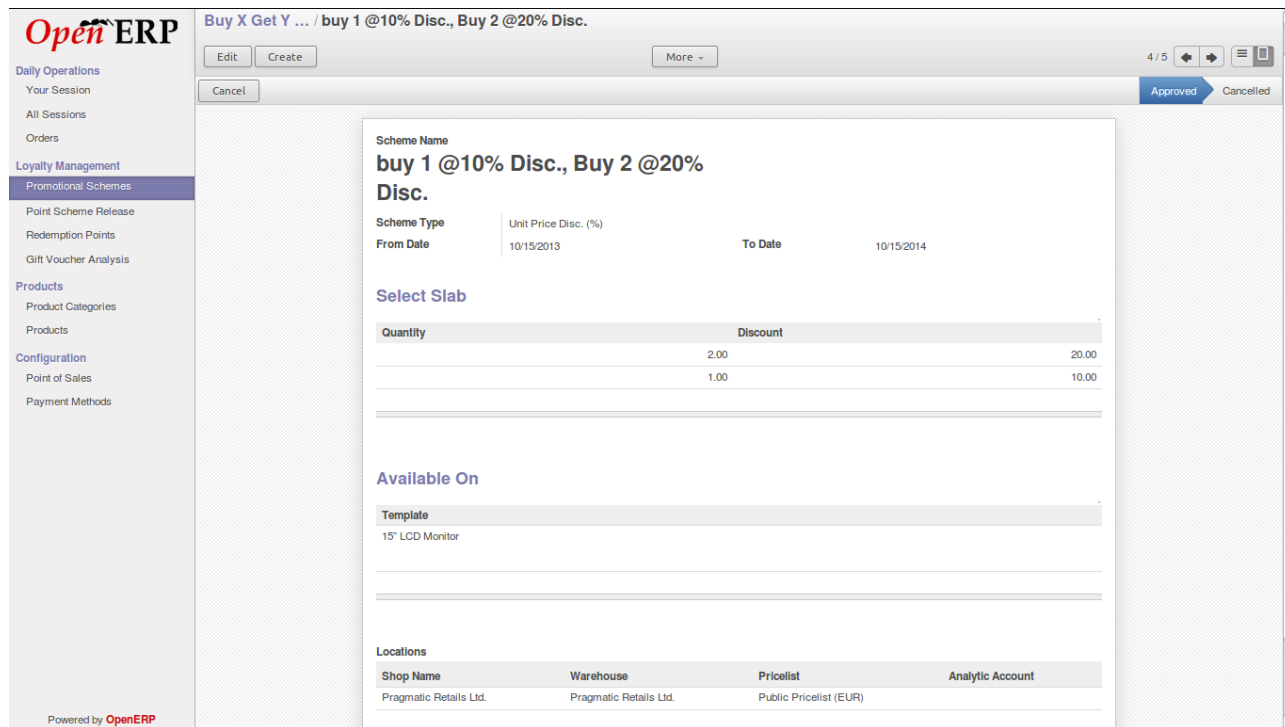
Scheme Type : This is Many 2 One field indicating fixed scheme type to be linked with given scheme. Here user selects "Unit Price discount (Amt)"

Select Slab : Here, user can create quantity slabs with unit price definition. In above example there are two slabs I.e if 1 Quantity is purchased then per unit price will be 100 & if 2 quantities are purchased then per unit price will be 80.

Available on : This is many to many field where user can select products for which above scheme need to be made applicable.

Locations : This is many to many field where user can select different branches for which above scheme need to be made applicable.

8.3 Unit Price Discount (%)



OpenERP Buy X Get Y ... / buy 1 @10% Disc., Buy 2 @20% Disc.

Buttons: Edit, Create, More, Cancel, Approved, Cancelled

Scheme Name
buy 1 @10% Disc., Buy 2 @20% Disc.

Scheme Type
Unit Price Disc. (%)

From Date 10/15/2013 **To Date** 10/15/2014

Select Slab

Quantity	Discount
2.00	20.00
1.00	10.00

Available On

Template
15" LCD Monitor

Locations

Shop Name	Warehouse	Pricelist	Analytic Account
Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Public Pricelist (EUR)	

Powered by OpenERP

Though this method user can offer quantity wise discount in % on sales price of selected product

Scheme Name : This is a text field where user can define promotional scheme name

Scheme Type : This is Many 2 One field indicating fixed scheme type to be linked with given scheme. Here user selects "Unit Price discount (%)"

Select Slab : Here, user can create quantity slabs with discount percentage. In above example there are two slabs I.e if 1 Quantity is purchased then 10% discount & if 2 quantities are purchased then 20% of discount is offered on sales price.

Available on : This is many to many field where user can select products for which above scheme need to be made applicable.

Locations : This is many to many field where user can select different branches for which above scheme need to be made applicable.

8.4 Volume Discount

Above scheme offers user to create quantity volume based price for a given set of products. In following example

Windows 7 Profession Product is selected and if customer purchases 3 quantities of it in one purchase then its total price will be adjusted to Rs. 1000 even if its

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[Promotional Schemes](#)
[Point Scheme Release](#)
[Redemption Points](#)
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Buy X Get Y ... / Buy 3 @ 1000

[Edit](#)
[Create](#)
[More ▾](#)

[Cancel](#)

[Approved](#)
[Cancelled](#)

Scheme Name

Buy 3 @ 1000

Scheme Type

Volume Discount

From Date

10/15/2013

To Date

10/15/2014

Buy A Qty

3

Offer Price

1000

Available On

Template

Windows 7 Professional

Locations

Shop Name	Warehouse	Pricelist	Analytic Account
Pragmatic Retails Ltd.	Pragmatic Retails Ltd.	Public Pricelist (EUR)	

***** Thank You *****