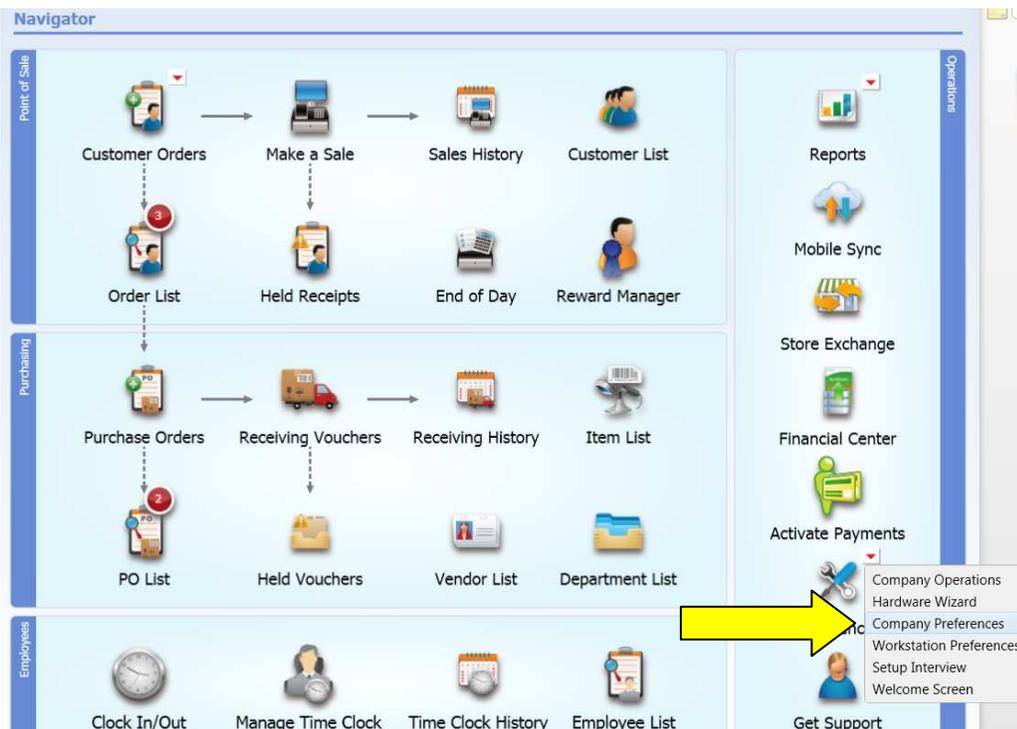




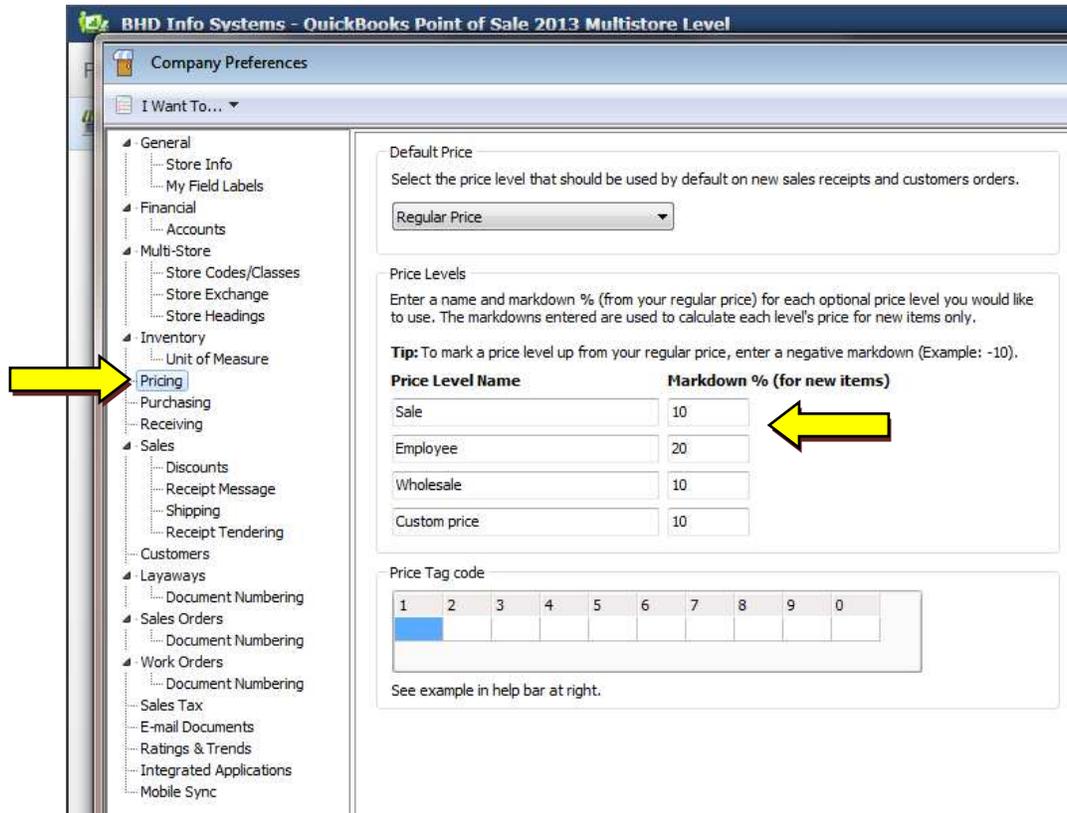
QB POS Customer Discounts November, 2014 QB POS v2013

In QB POS v2013 you can give your customers **Discounts** in several ways. This month we will look at two of those ways, **Price Levels** or **set discounts**.

1. We will start with **Price Levels**. You can assign a Price Level to a Customer. We'll start by looking at Price Levels. We will go to Preferences > Company Preferences.



2. Next we will look at our **Price Levels**.



3. We can adjust the **Markdown %** of any **Price Level** we choose. We can also change the names of the Price Levels.
4. After deciding which Price Level we want to use (**Employee**), we can assign it to one or more Customers/Employees. So I will go to my Customer List and Select the Customer/Employee.



5. Next I will edit the Discount.

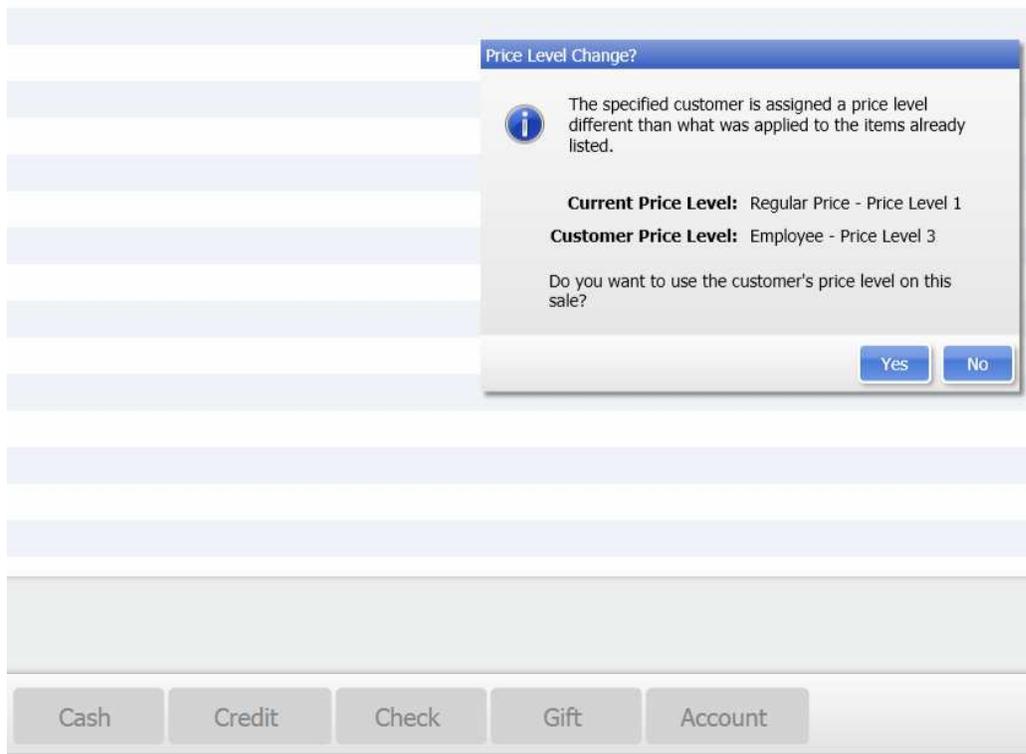
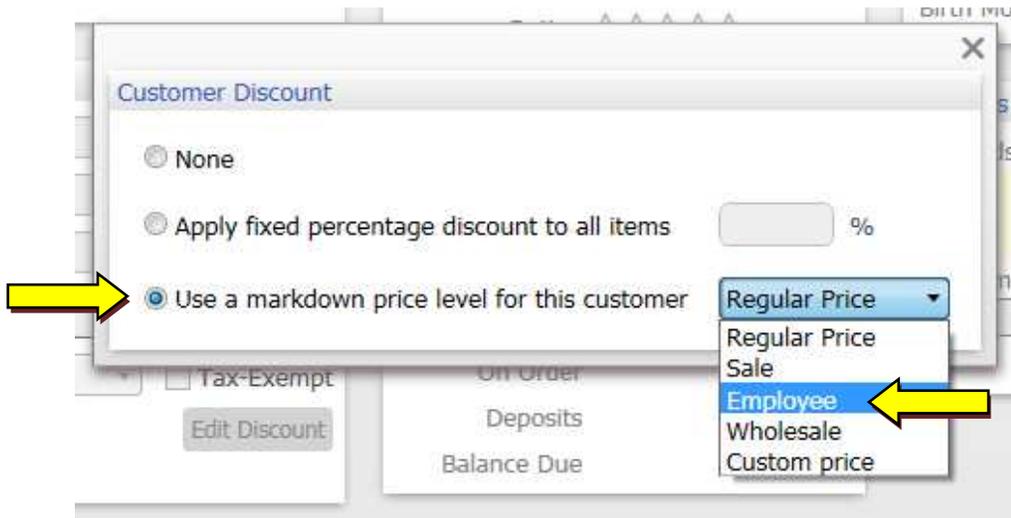
The screenshot shows the 'Edit Customer' window for 'Gomez Addams'. The 'Customer Settings' section is expanded, showing the 'Discount' dropdown menu set to 'None'. A yellow arrow points to the 'Discount' dropdown, and another yellow arrow points to the 'Edit Discount' button. Other sections include 'Contact Info' (Phone: 916-368-1070), 'Customer Notes', 'History', 'Statistics' (Rating: 5 stars, Last Sale: \$0.00), 'Custom Fields' (Birth Month), and 'Rewards' (Rewards Member: , Amount: \$0.00, Active: , Expires: , buttons: New, Show History, Remove).

6. You can set the **Discount** to either a **Price Level** or **set Discount**. Click on **Edit Discount**.

The screenshot shows the 'Customer Discount' dialog box. The 'None' option is selected. The 'Apply fixed percentage discount to all items' option is highlighted with a yellow arrow, and the 'Use a markdown price level for this customer' option is also highlighted with a yellow arrow. The dialog box has a close button (X) in the top right corner. The background shows the 'Statistics' section of the 'Edit Customer' window.

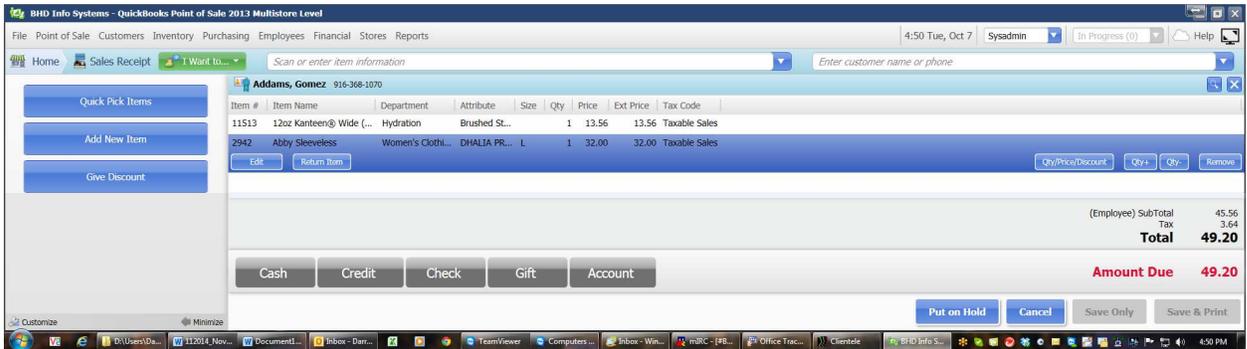
7. If we choose **Apply fixed percentage discount to all items**, then all item on sales receipts will get that Discount percentage off (except when an item might be on sale for a greater percentage off, then they get the larger of the two Discounts, they are NOT combined).

8. If we choose **Use a markdown price level for this customer**, then all item on sales receipts will get that Price Level percentage off (except when an item might be on sale for a greater percentage off, then they get the larger of the two Discounts, they are NOT combined).
9. I start with **Use a markdown price level for this customer**, for **Employee**, click **SAVE**, then go to **Make A Sale**.

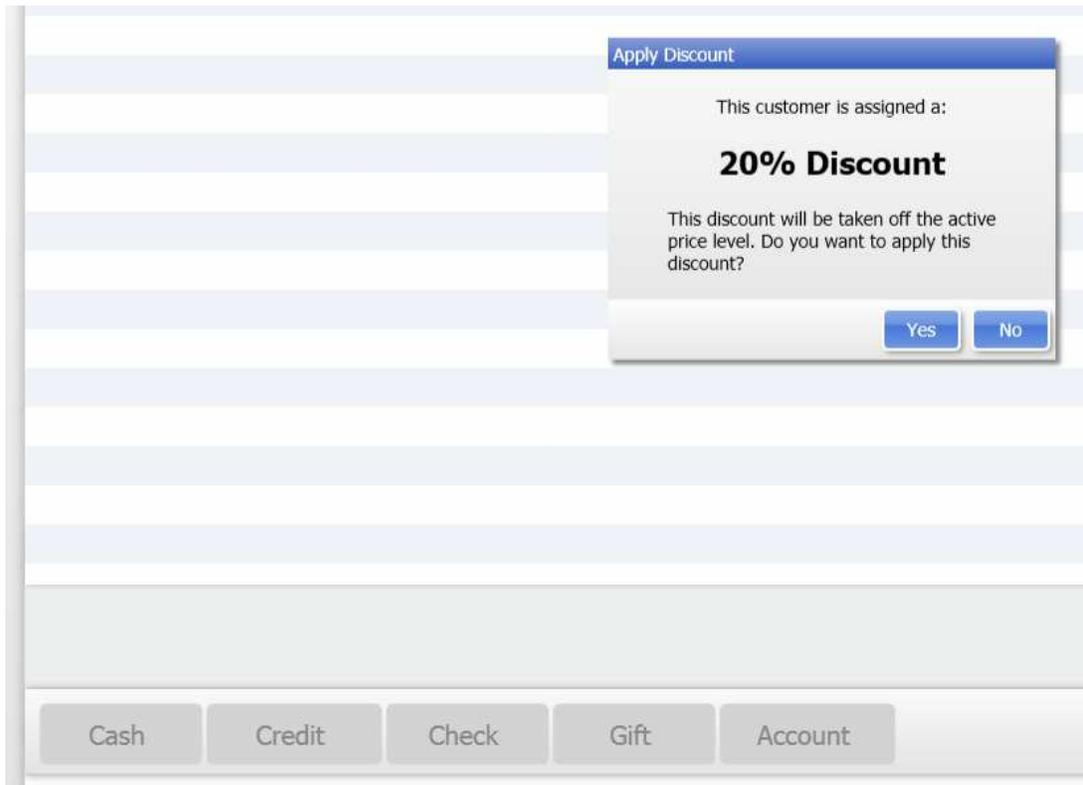


10. After adding the Customer Name, you can choose to use the Price Level.

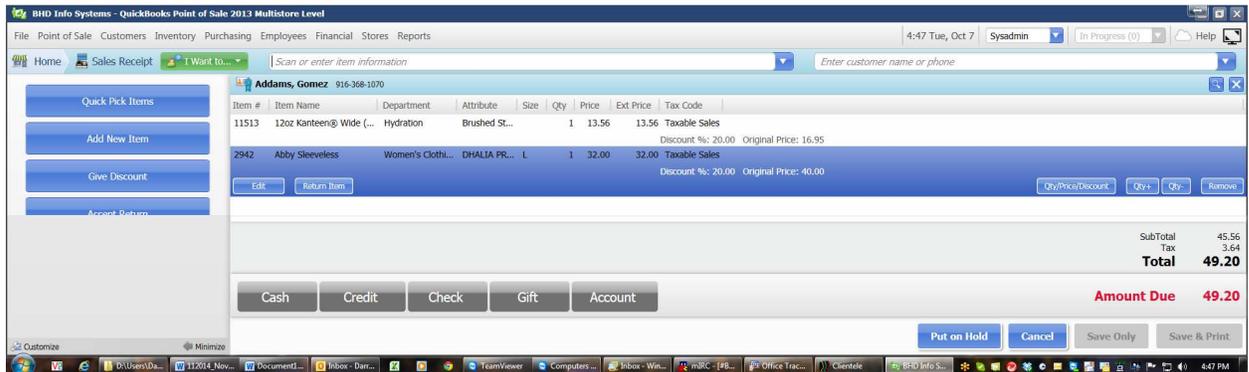
11. When you choose Yes, everything you put on the receipt will get the Discount (note: with Price Levels you do NOT see the Discount taken).



12. When you choose Discount Percentage, you will see this pop-up.



13. When you choose Discount Percentage, everything you put on the receipt will get the Discount (note: you will see the Discount taken).



Note: You can also use **Item Discounts** or **Global Discounts**.