

# Promotions

Manage order Promotions for eCommerce and in store

- [Summary](#)

# Summary

Promotions are use to add discounts to orders within the website.

Promotions are applied at basket level, meaning that they are not visible on individual [Product Detail Pages](#).


## Key to icons (Promotions)

 = Edit Promotion

 = Delete Promotion

 = Copy Promotion

## Key to icons (Groups)

 =Edit Promotion group

 =Delete Promotion group

 = View Promotions within the group

If you can not find the promotion you are looking for, be sure to check the box for 'show expired promotions'

## Setup

When applying changes, saving changes will save changes on all tabs simultaneously

## Description

Field	Purpose
Promo Name	<i>The name of the promotion (required)</i>  <i>This is output to the customer in the eCommerce checkout, shown in the POS, etc.</i>

Field	Purpose
Description	<p>Add a summary to the description here</p> <p>This will be output to the customer at the eCommerce checkout</p>
Receipt/Email Confirmation Message	<p>This message will be sent to the customer via email, or printed on the receipt if the promotion type is set to 'Till Spit'</p>

## Code

If a promotional code is not entered against the promotion, it will always be active if the other criteria are met.

Field	Purpose
Promo code	<p>Enter a promotional code; this must be entered to activate the promotion</p>
Promo code aliases	<p>If you would like multiple codes to be used for a single promotion, enter them here</p>
Bulk generate promo code aliases (number to generate)	<p>Enter a number of codes required</p> <p>You will need to send these to customers, likely by copying and pasting these into a third party system</p>
Limit to once per code	<p>If ticked, each code will only be useable once</p>

## Group

Field	Purpose
Promotion Group	<p>Select a group for this Promotion to sit within</p>

## Type

### Fixed Promotion

Field	Purpose
Discount	<p>Enter an amount to be discounted from the order when the promotion is applied</p>

### Percentage Promotion

Field	Purpose
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Discount	<i>Enter a percentage amount to be discounted from qualifying items when the promotion is applied</i>
Qualifying items	<i>Choose from:</i> <ul style="list-style-type: none"> <li>• All qualifying items</li> <li>• Lowest priced item</li> </ul>

## Product Promotion

Field	Purpose
Product	<i>Use this field to search for a Variant</i>
Quantity allowed	<i>Enter the maximum quantity allowed</i>
Promotional price	<i>Enter the promotional price for this product (this will be applied to as many instances of the product as allowed by the above field)</i>

## Addon Promotion

Field	Purpose
Addon	<i>Use this field to search for a Variant</i>
Percentage Discount	<i>Enter a percentage</i>  <i>This will exclude the surcharge</i>

## Free Shipping Promotion

Field	Purpose
Method	<i>Choose which postage type you would like to be discounted</i>
Zone	<i>Choose which <a href="#">Postage Zones</a> will benefit from free postage</i>

## Buy X Get One Free

Field	Purpose
Free product	<i>Choose from:</i> <ul style="list-style-type: none"> <li>• Items must be the same</li> <li>• Lowest priced item is free</li> </ul>

## Till Spit Promotion

*A till spit promotion is not a promotional discount in and of itself; rather it is a way of sending a message to a customer if their order meets a certain criteria, e.g. if they place an order for 500*

bolts, you can inform them that you have an offer for 10% off spanners next weekend.

A Till Spilt Promotion will also require a Receipt/Email Confirmation Message from Step One

Field	Purpose
Linked promo code	<i>This code will be displayed on the till/email receipt (Optional)</i>

## Date

Field	Purpose
Starts	<i>Enter the time and date that the Promotion should activate (Optional)</i>
Expires	<i>Enter the time and date that the Promotion should deactivate (Optional)</i>

## Min/Max

Field	Purpose
Minimum Value	<i>Optional</i> <i>If entered, a customer will have to spend between these two values to qualify for the promotion</i> <i>If left blank, that value will be ignored</i> <i>If both are blank, there will be no value limitations upon the Promotion</i>
Minimum Quantity	<i>Optional</i> <i>If entered, a customer will have to buy a number of items between these two values to qualify for the promotion</i> <i>If left blank, that value will be ignored</i> <i>If both are blank, there will be no quantity limitations upon the Promotion</i>

## Quantifying

If not set, all products will be eligible for the promotion, e.g. if no qualifying Categories are chosen, products from all Categories are eligible for that Promotion

Field	Purpose
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For category, brand and department rule match:	<i>Choose whether a qualifying product must be within one of the qualifying categories/brands/departments, or in all of them</i>
Choose qualifying categories	<i>Choose the Categories that are qualifying; products within them will be eligible for the Promotion</i>
Choose qualifying brands	<i>Choose the Brands that are qualifying; products within them will be eligible for the Promotion</i>
Choose qualifying departments	<i>Choose the Departments that are qualifying; products within them will be eligible for the Promotion</i>
Choose qualifying products	<p><i>Choose specific Products that will be eligible for the Promotion</i></p> <p><b>If you choose any specific Products, only those Products will be eligible for the Promotions</b></p>
Must also buy these qualifying products	<i>Choose specific Products that must be part of the order in order to qualify for the Promotion</i>
Optional Filter	<p><i>Enter text that will filter the application of this Promotion to specific Variants. E.g., to only apply this promotion to the large variant of a product, simply enter "large" here. Use a comma-separated list to allow multiple values to qualify.</i></p> <p><b><i>This must be an exact text match.</i></b></p>

## Excluded

If not set, there will be no exclusions

<b>Field</b>	<b>Purpose</b>
For category, brand and department rule match:	<i>Choose whether a qualifying product must be within one of the qualifying categories/brands/departments, or in all of them</i>
Choose excluded categories	<p><i>Choose the Categories that are excluded; this will override any selections under Step 7</i></p> <p><i>It is possible to include Categories, and exclude their Sub Categories</i></p>
Choose qualifying brands	<i>Choose the Brands that are excluded; this will override any selections under Step 7</i>
Choose qualifying products	<i>Choose the Products that are excluded; this will override any selections under Step 7</i>

Field	Purpose
Exclude sale items	<i>This will exclude any and all Products with an active Special Offer Price from the Promotion</i>
Exclude 'Must also buy these qualifying products' from the discount?	<i>Although required to trigger the Promotion, these Products will be excluded from any discounts</i>

## Limit Offer

Field	Purpose
Maximum uses	<i>Enter a maximum number of times the Promotion may be used</i>
Times used so far	<i>This number will automatically increment</i>  <i>It may be edited if required</i>
Limit to once per customer	<i>This will limit Promotion usage to once per email address</i>

## Exclusive

Field	Purpose
Use with other promos?	<i>If set to 'no' this Promotion will not be used with other Promotions</i>  <i>If multiple Promotions are available to a Basket, the one with the largest saving will be applied</i>

## Customer Group

Field	Purpose
Qualifying customers	<i>Select a <a href="#">Customer Group</a> to limit access to the Promotion</i>

## Account Type

This step will only be applicable to instances with both D2C and B2B solutions

Field	Purpose
Pricing Type	<i>If set to 'Retail', all figures will be based on Gross prices</i>  <i>If set to 'Trade', all figures will be based on Net prices</i>

