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	*The name of the promotion (required)* *This is output to the customer in the eCommerce checkout, shown in the POS, etc.*

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

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

Group

Field	Purpose
Promotion Group	*Select a group for this Promotion to sit within*

Type

Fixed Promotion

Field	Purpose
Discount	*Enter an amount to be discounted from the order when the promotion is applied*

Percentage Promotion

Field	Purpose

Discount	*Enter a percentage amount to be discounted from qualifying items when the promotion is applied*
Qualifying items	*Choose from:* • *All qualifying items* • *Lowest priced item*

Product Promotion

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

Addon Promotion

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

Free Shipping Promotion

Field	**Purpose**
Method	*Choose which postage type you would like to be discounted*
Zone	*Choose which Postage Zones will benefit from free postage*

Buy X Get One Free

Field	**Purpose**
Free product	*Choose from:* • *Items must be the same* • *Lowest priced item is free*

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 Spit Promotion will also require a Receipt/Email Confirmation Message from Step One

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

Date

Field	Purpose
Starts	*Enter the time and date that the Promotion should activate (Optional)*
Expires	*Enter the time and date that the Promotion should deactivate (Optional)*

Min/Max

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

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

For category, brand and department rule match:	*Choose whether a qualifying product must be within one of the qualifying categories/brands/departments, or in all of them*
Choose qualifying categories	*Choose the Categories that are qualifying; products within them will be eligible for the Promotion*
Choose qualifying brands	*Choose the Brands that are qualifying; products within them will be eligible for the Promotion*
Choose qualifying departments	*Choose the Departments that are qualifying; products within them will be eligible for the Promotion*
Choose qualifying products	*Choose specific Products that will be eligible for the Promotion* > If you choose any specific Products, only those Products will be eligible for the Promotions
Must also buy these qualifying products	*Choose specific Products that must be part of the order in order to qualify for the Promotion*
Optional Filter	*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.* > *This must be an exact text match.*

Excluded

> If not set, there will be no exclusions

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

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

Limit Offer

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

Exclusive

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

Customer Group

Field	Purpose
Qualifying customers	*Select a Customer Group to limit access to the Promotion*

Channel

Field	Purpose
Channel Type	*Choose from:* • *Both* • *Website Only* • *CMS & POS Only*

Account Type

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

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