

# CommerceCM Promotions

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# What is a promotion?

The promotions component of CommerceCM is an extremely robust tool which allows you to set up customized rewards in your store. These promotional rewards can be either automatically applied when the shopper meets the criteria you specify, or selectively applied when the shopper enters a coupon / promotion code that you have set up.

*A promotion is not a sale.* Sale prices can be applied to individual products, if that is your goal. Promotions are used to discount a product, an order or shipping on the basket or during the checkout.

You can create, modify or delete promotions from the promotions section of the manager which is found at [store > marketing > promotions](#)

The screenshot shows the 'Promotions' management interface in CommerceCM. At the top is a navigation bar with tabs: STORE, CONTENT, USERS, LANGUAGE, NEWSLETTER, and VIEW S. Below this is a sub-navigation bar with tabs: CATALOG, MARKETING, REPORTS, ORDER ENTRY, and ADMIN. The 'MARKETING' tab is active, and a dropdown menu is open showing options: PROMOTIONS (highlighted), CROSS SALES, SITE ADS, REFERRERS, STORE LOCATIONS, IMAGES, DATA FEEDS, and PRODUCT REVIEWS. The main content area is divided into three sections: 'General Data' with fields for Name (Morgan's), Rank (110), Start (08/03/2), End (03/31/2), and Category (-- Select); 'Description Data' with fields for EN-US and FR-CA; and 'Coupon Data' with a Status dropdown (No Coupon), a text area for coupon rules, a 'Max Uses' field (-1), and a confirmation message: 'You have selected No Co receive the reward.'

Promotions can be setup to target:

- A range of dates, for example: "Boxing Week - 25% off" promotion from Dec 26 - Dec 31.
- shoppers meeting certain criteria, such as where they live, value of items in their shopping cart, the number of items in their shopping cart, specific items in their cart or how much they have spent shopping in your store in the past (if they are logged in as a registered customer)
- One or more SKUs in your inventory
- A particular currency (if your store supports more than one)

The rewards could be:

- Discount on specific product(s)
- Discount on the order
- Discount on shipping
- A fixed dollar amount or a percentage
- In addition to, or exclusive of other promotions you have running

## Promotions Manager Overview

When you click on [Store > Marketing > Promotions](#) to access the Promotions Manager you will be greeted with a screen similar to this:

The screenshot shows the Promotions Manager interface with the following sections:

### Quick Stats

	Active Promos	Orders	Items
YTD: 2016	23	222	198
Last Month: February	0	0	0
Month To Date: March	0	0	0

### Create New Promotion

Name:

Rank:  Active: ☒

Start:  00:00:00 AM End:  00:00:00 AM

Category: -- Select Category --

[\[Add/Edit Categories\]](#)

### Data Controller

Show: -- All Currencies -- Select Range: Select Time Or

Active Promotions From: (mm/dd/yy) 01/01/1999 To: 03/02/2016

expand all [ + ]	Rank	Title	Description	Start	End	Order	Uses	Active	Delete
[ + ]	1	Test Specific Shopper Shipping City	TestCity For Specific Shopper	02/07/2016 12:00 AM	02/29/2016 12:00 AM	0	0	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>
[ + ]	5	Rickie Test 1		03/15/2016 12:00 AM	03/18/2016 12:00 AM	0	0	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>

Client: 3.5.3.0  
CommerceCM: 35.2013.4.0  
SiteCM: 35.2013.4.0  
ideaLEVER: 35.2013.4.0

There are three main sections here: Quick Stats, Create New Promotion and Data Controller.

### Quick Stats

This section gives you a quick snapshot of the current year's promotion activity. It shows the number of Active Promotions, number of

Quick Stats			
	Active Promos	Orders	Items
YTD: 2016	23	222	198
Last Month: February	0	0	0
Month To Date: March	0	0	0

orders and the number of items sold for all the promotions.

## Data Controller

The Data controller is a powerful search tool that allows you to:

- Search / list all current and past promotions, using the criteria in the various fields
- Manage which promotions are current and active
- Get a quick overview of the number of purchases and items purchased using each promotion
- Open individual promotions to edit or update them

Show:

-- All Currencies --

Active Promotions

-- All Categories --

Select Range:

Select Time

Or



From: (mm/dd/yy)

01/01/1999

To:

03/02/2016

SHOW RESULTS

expand all [ + ]	Rank	Title	Description	Start	End	Order	Uses	Active	Delete
[ + ]	1	Test Specific Shopper Shipping City	TestCity For Specific Shopper	02/07/2016 12:00 AM	02/29/2016 12:00 AM	0	0	<input checked="" type="checkbox"/>	
[ + ]	5	Rickie Test 1		01/15/2016 12:00 AM	02/18/2016 12:00 AM	0	0	<input checked="" type="checkbox"/>	
UPDATE									

### Listing promotions:

With this tool, you can list:

- promotions in any or all currencies that your site supports
- all promotions, all inactive promotions or all active promotions
- promotions in any or all categories
- promotions that fall within a particular date range.

(note: when you specify a particular date range, the data controller will list any promotions where *any part* of their activity falls within that range.)

### Limited promotion management:

With this tool you can **change a promotion status** from active to inactive or vice versa. Simply check or uncheck the checkbox in the “Active” column.

You can also permanently **delete the promotion** by clicking on the trash can icon at the end of the row.

### Promotion Summary:

If your promotion has resulted in any orders, you can get a summary of those orders by clicking on the “[ + ]” in the “[expand all](#)” column. This will show you the number of orders, the number of items ordered, and the value of the orders (in that sequence), for each of the currencies that your CommerceCM site supports.

expand all [ + ]	Rank	Title	Description	Start	End	Order	Uses	Active	Delete
[ - ]	-5	BHTEST2	Shipping Promo \$5 Off USD FLAT TOTAL	12/13/2015 12:00 AM	09/30/2016 12:00 AM	3	3	<input checked="" type="checkbox"/>	
	USD	orders   items   value		3	4	\$77.98			

Clicking on the ‘[orders](#)’ number (in this example the 3) will take you to a listing of all orders to which this promotion was applied.

### Editing a Promotion:

In the data controller, you can click on any of the [promotion names](#) listed in the “Title” column and you will be taken to a window where you can modify all the attributes of that particular promotion.

### Create New Promotion

#### Create New Promotion

Name

Rank:

Start:

00:00:00 AM

End:

00:00:00 AM

Category:

-- Select Category --

CONTINUE >>

[\[Add/Edit Categories\]](#)

#### Name:

This is the starting point for creating a new promotion. Give your promotion a name, such as “March Madness Sale” or “Boxing Week Blowout Sale” or anything that strikes your fancy and will help you find and track your promotion later.

#### Rank:

The promotion’s “Rank” is a number value that determines its priority with respect to all other active promotions (should there be more than one active). The lower the number, the higher the priority - so a promotion with a rank of 1 would be applied before a promotion with rank 10 if

more than one promotion should apply to a particular order. **This is particularly relevant if it is possible that a customer may be utilizing more than one promotion at a time.** As an example; a valid promo code may not be applied if a No Coupon promo with with a higher ranking is active, provided only one promo can be applied.

#### Active:

This checkbox specifies whether or not the promotion should be considered active in the system. Inactive promotions will not be available to be accessed or used by customers.

#### Start / End Dates:

This is where you can specify the dates and times that the promotion will be active on the website (if the promotion is marked active, of course). You can either enter the start and end dates in the text boxes or you can click the calendar icon to display a popup calendar where you can click on the appropriate dates. The date format for the text box is **mm/dd/yyyy**.

#### Category:

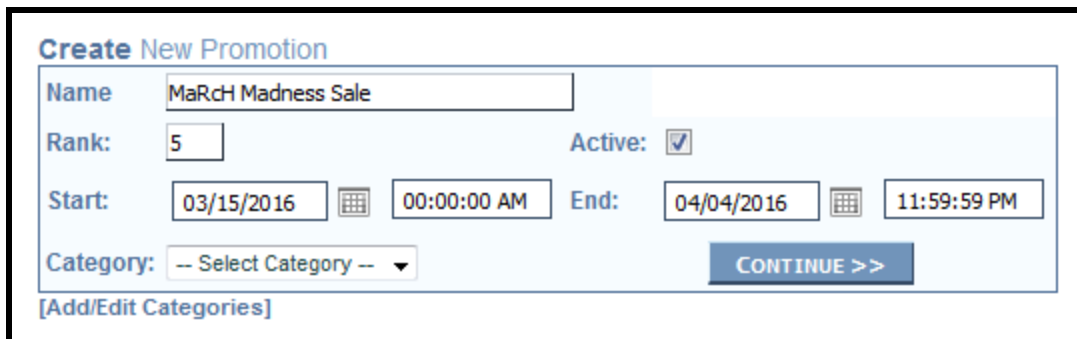
You can create categories and group your promotions into these categories. Categories are a selection criterion in the Data Controller, and simply help you to keep your site organized as you create more and more promotions over the years. It is not required to have and use categories, but it can be helpful if you have many promotions stored in your manager.

To use an existing category, select it from the [Category](#) dropdown box. If you would like to create a new category, click the [\[Add/Edit Categories\]](#) link at the bottom of the Create New Promotion box to get to that dialog, described later in this document.

## Promotion Management

To **create a new promotion** from scratch, you can start from [store > marketing > promotions](#) and fill in the “[Create New Promotion](#)” box.

In the example below, I have started the process for creating a March Madness Sale with a couple random capitals to further illustrate the madness. This promotion will run from March 15, 2016 at midnight to April 4, 2016 at 11:59:59 PM



The screenshot shows a web form titled "Create New Promotion". It contains the following fields and controls:

- Name:** A text input field containing "MaRcH Madness Sale".
- Rank:** A text input field containing "5".
- Active:** A checkbox that is checked, with the label "Active:".
- Start:** A date and time input field showing "03/15/2016" and "00:00:00 AM". Each part has a small calendar icon to its right.
- End:** A date and time input field showing "04/04/2016" and "11:59:59 PM". Each part has a small calendar icon to its right.
- Category:** A dropdown menu showing "-- Select Category --".
- Buttons:** A blue button labeled "CONTINUE >>" and a link labeled "[Add/Edit Categories]" below the form.

Complete this dialog box, click the “Continue” button and you will be taken to the [Edit Promotion Page](#) to define the specifics of your promotion more precisely (see next section).

To **edit an existing promotion**, you can click on the [name of the promotion](#) in the Data Controller, described above. It will take you to the same screen as when you create a new promotion, and you can change all aspects of your promotion, at any time, from there.

## The Create / Edit Promotion Window

This window will appear when you create a new promotion or edit an existing promotion. This section will describe each of the boxes in more detail.

**Store · Marketing · Create Promotion**

**General Data**

Name: MaRcH Madness Sale

Rank: 5 Active: ☒

Start: 03/15/2016 12:00:00 AM

End: 04/04/2016 11:59:59 PM

Category: -- Select Category --

**Coupon Data**

Status: No Coupon

Coupons allow you to control access to a promotion. The shopper must enter an ID you specify to activate a promotion. The Coupon ID cannot exceed 20 characters.

You have selected **No Coupon**, the shopper will not need to enter anything to receive the reward.

Max Uses: -1 Current Uses: 1

**Description Data**

Welcome to the March Madness Promoti EN-US

FR-CA

**Qualification Criteria**

Shoppers: ☒ Any Shoppers ☐ Specific Shopper(s) using criteria

Currency: ☒ Any Currency ☐ Specific currency

Purchase: Buy 10 Currency of ☒ Any Product ☐ Specific Product

EXCEPTIONS: ☒ No Exceptions ☐ Specific Products

**Promotion Reward**

Select Type: Discount on Order

Savings: % Off

CAD	25
USD	25
CAW	0
USW	0

☐ Apply Regardless of other promotions

☐ Apply Regardless of sale items

CANCEL SAVE

Client: 3.5.3.0  
CommerceCM: 35.2013.4.0  
SiteCM: 35.2013.4.0  
ideaLEVER: 35.2013.4.0

### General Data Dialog

**General Data**

Name: MaRcH Madness Sale

Rank: 5 Active: ☒

Start: 03/15/2016 12:00:00 AM

End: 04/04/2016 11:59:59 PM

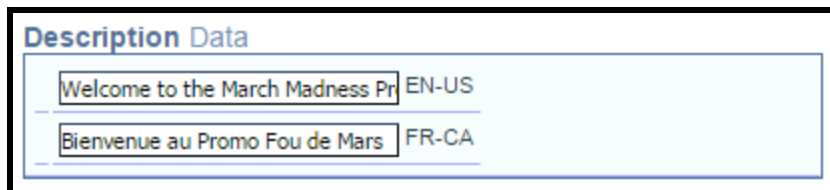
Category: -- Select Category --

This box has exactly the same function as the “Create New Promotion” box on the main page. Please refer to the documentation above for a

description of the various fields. Its contents can be edited or updated at any time.

### Description Data:

When someone redeems the coupon in the checkout process, the [description](#) of the promotion will show up on their checkout screen. If your CommerceCM site supports multiple languages, you can specify a description in each of those languages.



The screenshot shows a form titled "Description Data". It contains two text input fields. The first field contains the text "Welcome to the March Madness Pr" and is labeled "EN-US" to its right. The second field contains the text "Bienvenue au Promo Fou de Mars" and is labeled "FR-CA" to its right.

The label to the right of each text box indicates that language that the contents of the text box are appropriate for. The shopper must have that particular language active in their session.

## Coupon Based Promotions:

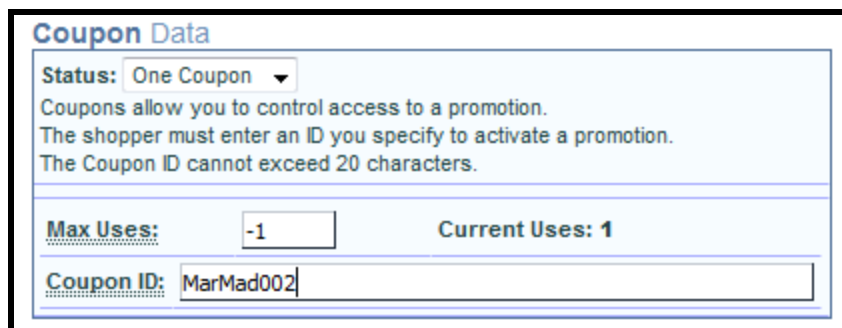
### Coupon Data

A promotion can come in many shapes and sizes, the first major type of promotion is based on coupon codes. If you would like your customers to use a coupon code to access a promotion, this is where you set it up.

Note: The default state for this is [“No Coupon”](#) so if you do not use this section, your shoppers will **not** have to enter a coupon code to receive the promotion.

### One Coupon

If you would like to create a single coupon code, select [“One Coupon”](#) in the status box. You will be presented with a new text box - [“Coupon ID:”](#) - where you can enter the name of the coupon code. This can be up to 20 characters long and should not include spaces or symbols.



The screenshot shows a form titled "Coupon Data". At the top, there is a "Status:" dropdown menu set to "One Coupon". Below this, there is instructional text: "Coupons allow you to control access to a promotion. The shopper must enter an ID you specify to activate a promotion. The Coupon ID cannot exceed 20 characters." Below the text, there are two fields: "Max Uses:" with a value of "-1" and "Current Uses: 1". At the bottom, there is a "Coupon ID:" field with the value "MarMad002" entered.

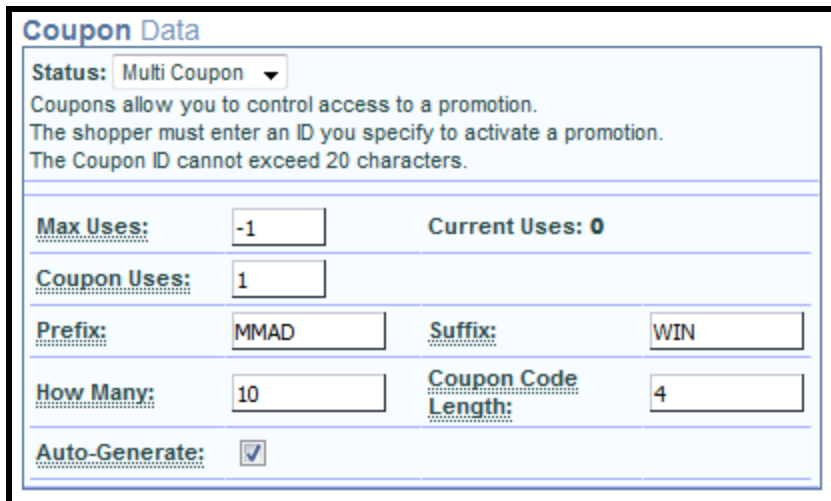


The “[Max Uses](#)” box specifies how many times this code can be redeemed. The value of -1 means “unlimited uses,” but if you can set this number to any number you choose, to cap the number of uses for each promotion coupon code.

## Multi Coupon

The multi-coupon function allows you to create and track multiple codes associated with the same promotion.

In the “[Status](#)” box, select [Multi Coupon](#) and you will see a screen similar to the screenshot here.



The screenshot shows a web form titled "Coupon Data". At the top, there is a "Status:" dropdown menu set to "Multi Coupon". Below this, there is explanatory text: "Coupons allow you to control access to a promotion. The shopper must enter an ID you specify to activate a promotion. The Coupon ID cannot exceed 20 characters." The form contains several input fields and a checkbox:

<b>Max Uses:</b>	<input type="text" value="-1"/>	<b>Current Uses:</b>	0
<b>Coupon Uses:</b>	<input type="text" value="1"/>		
<b>Prefix:</b>	<input type="text" value="MMAD"/>	<b>Suffix:</b>	<input type="text" value="WIN"/>
<b>How Many:</b>	<input type="text" value="10"/>	<b>Coupon Code Length:</b>	<input type="text" value="4"/>
<b>Auto-Generate:</b>	<input checked="" type="checkbox"/>		

**Max Uses:** The total number of coupon redemptions that may be completed. If you specify “-1” then there is no limit imposed.

**Coupon Uses:** The number of times that each coupon may be used. The above example allows each coupon to be used one time only, but you can change the value to allow coupons to be used multiple times.

**Prefix:** The first part of the coupon’s name

**Suffix:** The last part of the coupon’s name

**How Many:** The number of coupons to generate

**Coupon Code Length:** The number of characters generated and inserted between the prefix and suffix values. Note that the total length of the coupon’s name cannot exceed 20 characters. This includes the length of the prefix, the length of the suffix and the value you specify in this field.

This example will generate 10 coupons, each starting with the characters “MMAD” (the prefix) and ending with the characters “WIN” (the suffix.) The system will generate the coupon codes and put 4 random characters between the MMAD and WIN strings.

After clicking the “[Save](#)” button at the bottom of the screen the system will generate the codes according to your specification. These codes can then be distributed to customers for redemption. Please note that after these codes are generated, they cannot be edited or deleted. They can be set to inactive though if you wish.

The [Issued](#) check boxes can be checked or unchecked to help sales reps or the CommerceCM message center track which codes have been distributed. (see message center help section for an explanation of how to use the message center to distribute coupon codes.)

Coupon Codes					
expand all [ + ]	Coupon Codes	Orders	Uses	Active	Issued
[ + ]	MMADz2ArWIN	0	0/1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
[ + ]	MMADpr4DWIN	0	0/1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
[ + ]	MMADL8g3WIN	0	0/1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
[ + ]	MMAD7PrtWIN	0	0/1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
[ + ]	MMADXeVFWIN	0	0/1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
[ + ]	MMADjV75WIN	0	0/1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
[ + ]	MMAD9kBIWIN	0	0/1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
[ + ]	MMADv1MHWIN	0	0/1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
[ + ]	MMADSX7WIN	0	0/1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
[ + ]	MMADI7rjWIN	0	0/1	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### Coupon Redemption:

To redeem this coupon and take advantage of this promotion, the shopper will enter the specific code in a clearly labelled [coupon code](#) box during the checkout process on your CommerceCM website.

## Criterion-based Promotions

The other primary type of promotion is the criterion-based promotion. For this type of promotion, the customer does **not** need a coupon code and will automatically receive the promotion if they meet the specified criteria. The [qualification criteria](#) section is where you specify which customers will qualify. You can also use coupons and criteria in conjunction with each other; the shopper will then need to enter the code AND meet the criteria to qualify.

### Qualification Criteria

Qualification Criteria	
Shoppers	<input checked="" type="radio"/> Any Shoppers <input type="radio"/> Specific Shopper(s) using criteria
Currency	<input checked="" type="radio"/> Any Currency <input type="radio"/> Specific currency
Purchase	Buy <input type="text" value="12"/> Currency <input type="text" value=""/> of <input checked="" type="radio"/> Any Product <input type="radio"/> Specific Product
EXCEPTIONS	<input checked="" type="radio"/> No Exceptions <input type="radio"/> Specific Products

You can define your promotion to target certain shoppers, a specific currency or the contents of their basket at checkout. These functions will each be outlined in this section.

## Shoppers

You can either open up the promotion to all shoppers on your site, or just to specific shoppers who meet criteria that you specify. When you click “[Specific shopper\(s\) using criteria](#)”, you will see the following options:

The [where](#) drop-down menu allows you to select what type of criteria a shopper needs to be checked against in order to qualify for the promotion. The first six are standard **location** based promotions you can set up for specific aspects of either the shipping or billing address. The **email address** option, can be used to target a specific customer or group of customers. If your site has a newsletter function, the **subscribed to Newsletter** option will only apply to those on your newsletter list. The final four options (total number of purchases, total items purchased, accumulated dollars spent and accumulated dollars spent including current) apply only to **registered customers** who have signed into their accounts at the time of purchase and will look at that customer’s complete shopping history to determine if they meet the criteria. The **shopper type** option allows you to select between retail and wholesale shoppers if your site includes that functionality.

The second drop-down menu allows you to select what type of relationship the shopper must have to the specified criteria in order to qualify for the promotion:

The **equals** operator is used if there is only one value you are comparing against. For example, if you enter [Billing City](#) / = / [Vancouver](#) only those with a billing city of Vancouver will qualify. The **In List** and **Not in List** operators can be used if there are multiple values to compare against. So entering

[Billing City / In List / Vancouver,Coquitlam,Surrey](#) will qualify anyone whose billing city is one of the three cities included in the list.

**Note:** When completing the text box with a list in any section, the **list must be comma separated with no spaces after the commas.**

The greater than (>) and less than (<) operators can be used for numerical criteria such as the number of purchases or items in the customer's shopping history. For example, entering [total items purchased / > / 5](#) will only apply the promotion to registered customers who have purchased more than five items in the past.

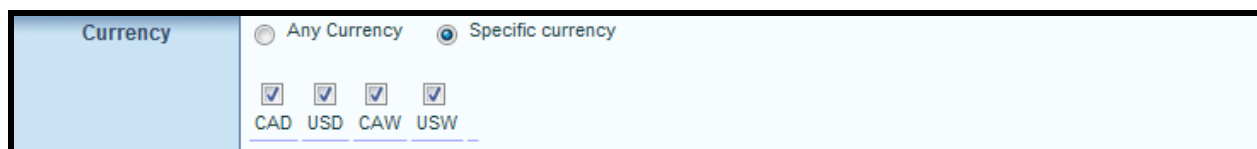
The **contains** operator allows you to set your criteria where the value entered in the text box, only needs to be a part of the customer's information, and not necessarily the complete value. For example, if you wanted to offer a promotion to the employees of 'Awesome Apples' you could enter [email / contains / @awesomeapples.com](#) and all customers with that email suffix would qualify for the promotion, regardless of the first half of their email. The **MatchRegEXP** operator allows you to write custom code to select customers who will qualify for your promotion and can be used by those with some coding knowledge.

To set up a **promotion for those subscribed to your newsletter**. Enter [subscribed to newsletter / = / 1](#). This will apply the promotion to customers who have a newsletter subscription at the time of checkout.

If you want to restrict the promotion so that a shopper can only use it one time, click the checkbox beside "[One per shopper.](#)" This will only allow each shopper to use the promotion one time.

## Currency

If you support more than one currency on your CommerceCM site, you can limit your promotion to shoppers using one of those currencies, or you can open it to everyone.

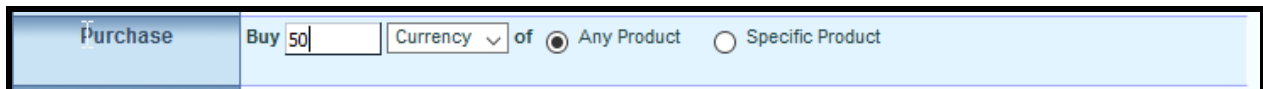
The image shows a user interface for selecting a currency. On the left, there is a blue header box labeled "Currency". To the right of this header, there are two radio button options: "Any Currency" and "Specific currency". The "Specific currency" option is selected, indicated by a blue dot. Below these options, there are four checkboxes, each with a currency code underneath: "CAD", "USD", "CAW", and "USW". All four checkboxes are checked, indicated by blue checkmarks inside the boxes.

The default setting is "[Any Currency](#)" which will apply the promotion regardless of currency. If you would like restrict the promotion to a specific currency, simply click on "[Specific currency](#)" and checkboxes will appear reflecting your site's supported currencies. You can then check or uncheck the boxes accordingly.

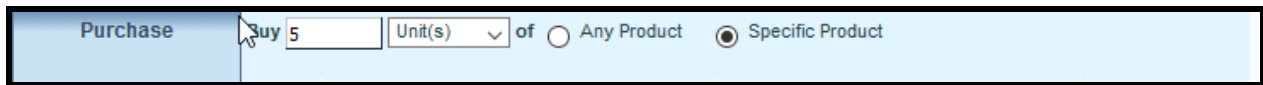
## Purchase

The purchase section allows you to apply promotions based on the contents of the basket of the current order.

The first two boxes allow you to set promotion qualification criteria based on either the total cost of the basket or the number of items it contains. Below are two examples of how this function can be used:



The screenshot shows a light blue bar with a dark border. On the left is a tab labeled "Purchase". To its right is a form with the text "Buy" followed by a text input field containing "50". Next to it is a dropdown menu labeled "Currency". This is followed by the word "of" and two radio buttons. The first radio button is selected and is labeled "Any Product". The second radio button is labeled "Specific Product".

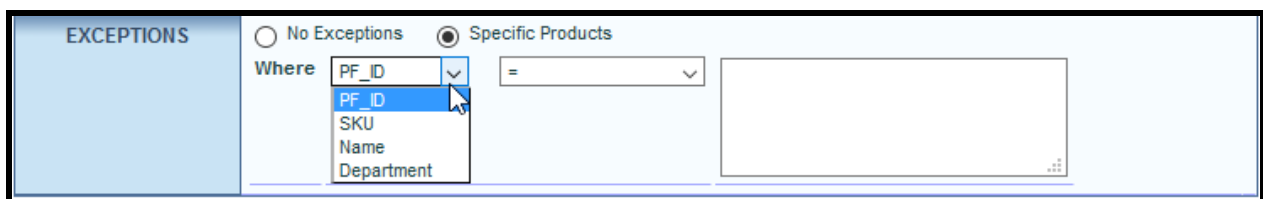


The screenshot shows a light blue bar with a dark border. On the left is a tab labeled "Purchase". To its right is a form with the text "Buy" followed by a text input field containing "5". Next to it is a dropdown menu labeled "Unit(s)". This is followed by the word "of" and two radio buttons. The first radio button is labeled "Any Product". The second radio button is selected and is labeled "Specific Product".

The first promotion will apply if the customer's current order exceeds 50\$ in value (at least 50.01\$) and the second if the customer's current basket contains at least 5 items.

Next you will need to specify whether these totals apply to any products or specific ones. The manager defaults to [any product](#); this setting indicates that the minimum order cost or units can be satisfied with any products.

However if you wish to only include specific products or departments in meeting the minimum basket criterion, you can select the [specific products](#) option. You will then be presented with the following options:



The screenshot shows a light blue bar with a dark border. On the left is a tab labeled "EXCEPTIONS". To its right are two radio buttons. The first is labeled "No Exceptions" and is unselected. The second is labeled "Specific Products" and is selected. Below the radio buttons is a form. It starts with the word "Where" followed by a dropdown menu. The dropdown menu is open, showing a list of options: "PF\_ID", "SKU", "Name", and "Department". To the right of the dropdown menu is an equals sign "=" followed by another dropdown menu. To the right of the equals sign is a large empty text input field.

You can specify which products that you want to include in satisfying the basket criteria by using PF\_ID, SKU, Name or Department\_ID. If you are unsure of this info, you can go to [store > catalog > products](#). You can see the product names right from this screen and if you open a product (click on [product name](#)) you will find the PF\_ID in the URL at the top and SKU(s) on the SKU tab.

First	Prev	1 of 9	Go	Next	Last	Refresh data
	POSID	Product Name	SKU's	Active	Clone	Delete
	test	Moneris CVD prod Test 2	1/1	True		
	911	Ethiopian (Medium Dark Roast)	1/1	True		
	411	Espresso Blend (Medium Dark Roast)	0/1	True		
	KH454	454 Horse Power Update	1/1	True		
	GA-198-112	Espresso Dose Cappucino Machine	1/1	True		

CommerceCM Developm... Documentation - Google ... Promotions - Google Docs http://demo...uage=EN\_US

demo2.commercecm.com/commercecm/manager/Products.aspx?Step=1&ProductID=4080&Language=EN\_US

commerceCM manager

STORE CONTENT USERS LANGUAGE NEWSLETTER VIEW SITE HELP SIGN OUT

CATALOG MARKETING REPORTS ORDER ENTRY ADMIN

Store · Catalog · Products · 'Espresso Dose Cappucino Machine' Foundation

Main | Foundation | Departments | Cross Sales | Properties | Relations **Product SKU(s)**

**Product Foundation**

POSID: GA-198-112

Type: Default

Active: ☒

Image: Gaggia Espresso Dose

Alternate Image: --None Selected--

Display Page: Standard


Allow Back Orders? ☐

Brand: Gaggia

Max Purchase Quantity: Unlimited

Has Attributes? ☐ Yes ☒ No

**Image Preview**



Departments must be identified using a department ID. To find a department ID go to [store > catalog > department](#) then select the department in question by clicking on its [name](#). On the department page, you will be able to see the department ID in the URL at the top of the screen.

Next you will need to specify the relationship that applies:

The “=” operator should be used if the promotion only counts a single Product, SKU, Department or PF\_ID against the basket criteria. The **In List** and **Not in List** operations can be used to include multiple Products, SKUs or Departments. Just be sure when listing the various SKUs or IDs in the text box, the **lists must be comma separated with no spaces after the commas**.

The **Contains** and **MatchRegEXP** operators can be used as outlined in the Shopper section above.

## Product/Department Exceptions

The exemption section allows you to exclude certain Products or Departments from your promotion. The product(s) listed or product(s) from the department(s) listed here will not be eligible for the reward listed below. Exemptions can be used for both coupon and criteria based promotions. The default setting is **No Exemptions** which means that all products will be eligible for the reward. However if you wish to exclude specific departments or products, you can select the **specific products** option and then complete the information for the excluded products as explained above in the **purchase** section.

EXCEPTIONS

☐ No Exceptions

☒ Specific Products

Where

PF\_ID

PF\_ID

SKU

Name

Department

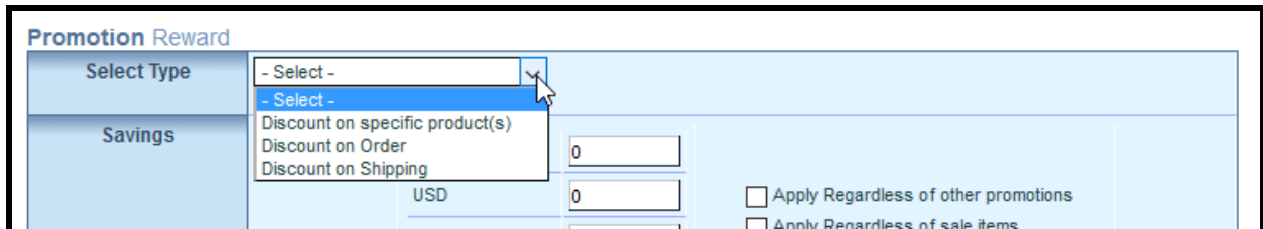
=



## Promotion Reward

The reward section specifies the value of the promotion. If the shopper meets the set criteria or enters a promo code, this is the reward that they will receive. It will be a discount on either specific products in the order, a discount on the entire order, or a discount on shipping.

### Selecting the type of Promotion Reward



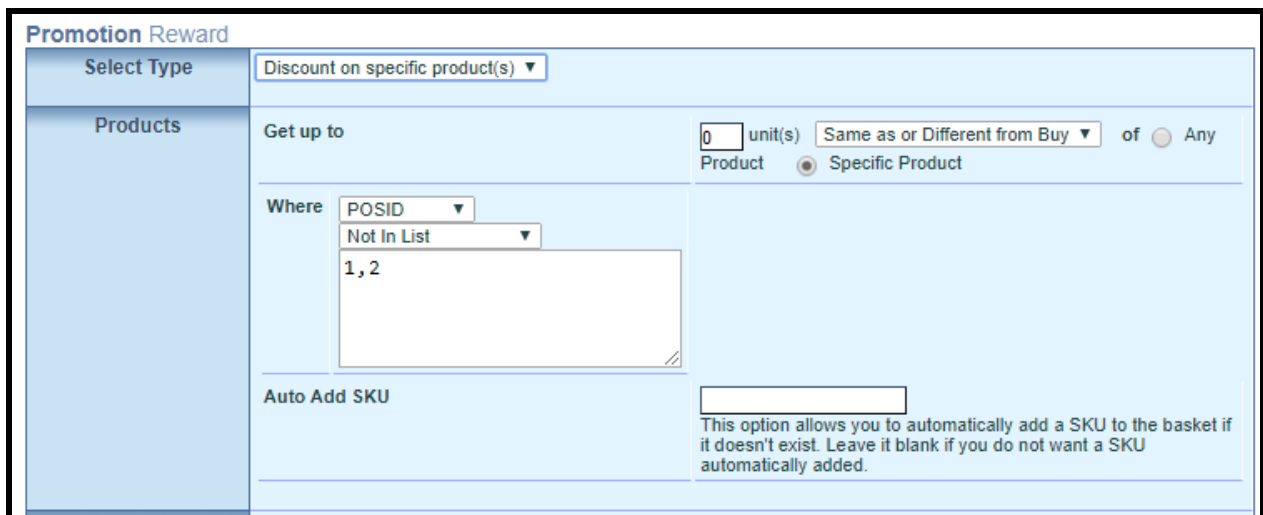
The screenshot shows the 'Promotion Reward' form. The 'Select Type' dropdown menu is open, displaying three options: 'Discount on specific product(s)', 'Discount on Order', and 'Discount on Shipping'. The 'Savings' section is visible below the dropdown, showing a 'USD' currency selector and two input fields for values, both currently set to '0'. There are also two checkboxes: 'Apply Regardless of other promotions' and 'Apply Regardless of sale items'.

There are three types of promotion awards available, as illustrated in the above screenshot. We will describe each one in the order shown in the drop down menu above.

### Discount on specific product(s)

If you would like to promote specific products in your inventory, this is where you would specify it. Start by selecting “Discount on specific product(s)” in the drop down menu.

A new section pops up that looks like this:



The screenshot shows the 'Promotion Reward' form with the 'Discount on specific product(s)' option selected. The 'Products' section is active, displaying 'Get up to' (0 unit(s)) and 'Same as or Different from Buy' (Same as). The 'Where' section shows 'POSID' and 'Not In List' dropdowns, with a text input field containing '1, 2'. The 'Auto Add SKU' section has a text input field and a description: 'This option allows you to automatically add a SKU to the basket if it doesn't exist. Leave it blank if you do not want a SKU automatically added.'

### Get up to

In the section labeled “**Get up to**” your options are to allow the customer to:

- Get up to x units of the same or different product
- Get up to x units of **only** a different product (same product is not eligible with this option)

The different product can be **any** product, or it can be a **specific** product.

For both of those options, the number of units in this promotion reward is specified in the box labeled “**unit(s)**”

[Click here for info on "Any Product"](#)

[Click here for info on “Specific Product”](#)

### Any Product

**Any Product** option box: If you would like the reward to be any product in your inventory, select the option box “Any Product” and the “Products” section will change to this:

Promotion Reward			
Select Type	Discount on specific product(s) ▼		
Products	Get up to	0 unit(s)	Same as or Different from Buy ▼ of <input checked="" type="radio"/> Any Product <input type="radio"/> Specific Product
	Auto Add SKU	<input type="text"/> <small>This option allows you to automatically add a SKU to the basket if it doesn't exist. Leave it blank if you do not want a SKU automatically added.</small>	
Savings	% Off ▼	CAD	50
		USD	0
		CAW	0
		USW	0
		<input checked="" type="checkbox"/> Apply Regardless of sale items	

In the dropdown menu in the Products section you have two choices:

**Same as or Different from Buy:** select this option to offer a discount on any product in your store, including the one(s) in the shopping cart.

**Different:** Select this option to only offer a discount on items that are not already in the cart.

**Auto Add SKU:** Add a SKU into this box in order to automatically add it to the shopping cart.

## Savings

This section will define the value of the promotion, either in dollar or percentage amount. In the dropdown menu, select either a dollar discount, or a percentage discount.

You may then specify the value of the percentage or dollar discount for each available currency. The values do not have to be the same for each currency, but you cannot specify a percentage for one and a dollar value for another.

**Apply Regardless of sale items:** Click on this checkbox to apply the savings reward whether the product is on sale, or full-priced.

## Specific Product

**Specific Product** option box: Click this option box if you would like a specific product, or a specific **type** of product, to be the promotion reward. This option is more restrictive than allowing any product in your inventory to be the promotion reward, but it gives you a great deal of latitude in specifying the reward.

When you select the “Specific Product” option box (which is the default setting) the section looks like this:

The screenshot displays the 'Promotion Reward' configuration interface. On the left, a sidebar contains 'Select Type' and 'Products'. The main area is titled 'Discount on specific product(s)'. It includes a 'Get up to' field with a value of '0' and a unit selector set to 'unit(s)'. A dropdown menu is set to 'Same as or Different from Buy'. Below this, there are radio buttons for 'Product' and 'Specific Product', with 'Specific Product' being selected. A 'Where' section contains a dropdown menu with 'POSID' selected, and a text box below it containing 'Not In List' and '1, 2'. At the bottom, there is an 'Auto Add SKU' section with a text input field and a descriptive note: 'This option allows you to automatically add a SKU to the basket if it doesn't exist. Leave it blank if you do not want a SKU automatically added.'

## Where

The section “Where” is where you specify the product, or group of products, that will be the promotion reward. There are two dropdown menus, and a multi-line input box shown. The three of them together will specify the criteria that the system will use to determine the reward.

The first dropdown menu box contains these four options:

- POSID
- SKU
- Name
- Department
  - You need to specify the Department ID. This integer value is obtained from the URL when editing a department.

This allows you to restrict the reward to a product that fits into one of those categories, such as a particular POSID, SKU, Name or Department.

POSID, SKU and Name are all case-insensitive text fields. Department is an integer.

The second dropdown menu box contains these options to further narrow down the selection:

- =
- In List
- Not In List
- Contains
- Match RegExp
  - This requires you to know how to program a “Regular Expression” and further instruction on how to do that is beyond the scope of this document.

This dropdown menu box is used in conjunction with the multi-line input box to narrow down the reward to a subset of your inventory.

### **Example 1:**

The promotion reward will be any product whose POSID contains the characters “CH-183”

The screenshot shows a web interface for selecting products. On the left is a blue sidebar labeled "Products". The main area has a header "Get up to" followed by a text input "2" and "unit(s)". To the right of this is a dropdown menu "Same as or Different from Buy" and a radio button "of" with "Any" selected. Below the header is a section labeled "Where" containing two dropdown menus: "POSID" and "Contains". The "Contains" dropdown is open, showing a multi-line text input box with the text "CH-183". Below the "Where" section is a section labeled "Auto Add SKU" with a text input box. To the right of the "Auto Add SKU" section is a text box containing the text: "This option allows you to automatically add a SKU to the basket if it doesn't exist. Leave it blank if you do not want a SKU automatically added."

This would give a promotion reward of up to 2 units of any product whose POSID contains the characters “CH-183” including, for example “CH-183-AB” or “12-CH-183ml”

Note that the criteria specified in the multi-line box are NOT case sensitive. In the above example, ch-183 and CH-183 would both honour the same products.

### Example 2:

The Promotion reward will be any item contained in a particular department in your online store.

You will need to obtain the department ID and to do this, you go into Catalog -> Departments and then click on a department name. The Department ID is at the end of the URL you will see in your browser’s address bar



Then setup the promotion reward like this:

A screenshot of a web form for setting up a promotion. The form has a light blue background. On the left, there is a vertical blue bar with the word "Products" in white. The main area is divided into sections. The top section is titled "Get up to" and contains a text box with "12", a label "unit(s)", a dropdown menu with "Same as or Different from Buy", and a radio button labeled "Any". Below this is a section titled "Where" with a dropdown menu showing "Department" and a sub-dropdown menu showing "=". Below the sub-dropdown is a text box containing "614". At the bottom left is a section titled "Auto Add SKU" with a text box. To the right of the text box is a paragraph of text: "This option allows you to automatically add a SKU to the basket if it doesn't exist. Leave it blank if you do not want a SKU automatically added."

You can also auto-add a sku to the customer’s basket.

**Note:** if there are multiple instances of a reward product or multiple shipping costs, the promotion will apply multiple times.

Auto Add SKU

Documentation Needed.

## Savings

This section appears below the selection criteria, and will define the value of the promotion, either in dollar or percentage amount. In the dropdown menu, select either a dollar discount, or a percentage discount.

Promotion Reward			
Select Type	Discount on specific product(s) ▼		
Products	Get up to	12 unit(s)	Same as or Different from Buy ▼ of <input type="radio"/> Any
		Product	<input checked="" type="radio"/> Specific Product
	Where	Department ▼ = ▼ 614	
	Auto Add SKU	<input type="text"/> <small>This option allows you to automatically add a SKU to the basket if it doesn't exist. Leave it blank if you do not want a SKU automatically added.</small>	
Savings	% Off ▼		
	CAD	50	<input type="checkbox"/> Apply Regardless of other promotions <input checked="" type="checkbox"/> Apply Regardless of sale items
	USD	50	
	CAW	0	
	USW	0	

You may then specify the value of the percentage or dollar discount for each available currency. The values do not have to be the same for each currency, but you cannot specify a percentage for one and a dollar value for another.

In the example shown above, the savings is 50% off the products that match the promotion reward criteria, as long as the customer is shopping in CAD or USD.

**Apply Regardless of sale items:** Click on this checkbox to apply the savings reward whether the product is on sale, or full-priced.

## Discount on order

Promotion Reward			
Select Type	Discount on Order ▼		
Savings	-- Select -- ▼	CAD	50
	-- Select --	USD	0
	\$ Off	CAW	0
	% Off	USW	0
		<input type="checkbox"/> Apply Regardless of other promotions <input type="checkbox"/> Apply Regardless of sale items	

When you select “Discount on Order” the promotion will be applied to the customer’s order. You can select a dollar amount or a percentage of the order’s total amount. To the right of the dropdown menu where you would select “Discount on Order” there are boxes for each currency your store supports and you can apply different values in each of the boxes. So, for example, you could give the customer \$50 if they are using Canadian dollars, and \$20 if they are using US dollars.

There will be two checkboxes enabled when you choose this option.

**Apply Regardless of other promotions:** Select this checkbox to allow the promotion to be applied in conjunction with other promotions. If checked, customers may qualify for multiple promotions and the promotions will be applied in the order of their listed rank.

The default setting is **not** to apply multiple promotions. This means if a customer qualifies for multiple promotions, only the promotion with the lowest rank (specified in the promotion’s general data) will be applied.

**Apply Regardless of sale items:** Select this checkbox to allow the promotion to be applied to sale items as well as regular priced items.

The default setting is **not** to discount items that are already on sale. However checking this box will apply the promotion regardless. This is only relative to Discounts on Products.

## Discount on Shipping

The screenshot shows a web form titled "Promotion Reward". It has two main sections: "Select Type" and "Savings".

- Select Type:** A dropdown menu is set to "Discount on Shipping". To its right is another dropdown menu with "Apply to All" selected. Below this second dropdown is a list of options: "Apply to All", "CAD Canada flat total", and "CAD Canada percentage".
- Savings:** A dropdown menu is set to "-- Select --". To its right is a table with four rows, each representing a currency and a corresponding input field for a value.

Currency	Value
CAD	5
USD	0
CAW	0
USW	0

Selecting “Discount on Shipping” allows you to give a discount to one or all of the different shipping zones you have defined. These are the only options: if you have 5 zones setup, you cannot select two or three of them. You can only choose one of them, or “apply to all.”

The “Savings” dropdown will allow you to select either a dollar amount or a percentage, just like the “discount on order” described above. You may also specify a value in each of the currencies supported by your store.

## Case Sensitivity of Promotions

In order to protect against issues with customers entering promo codes with incorrect case, all promo codes are automatically lowered in case. This means that regardless of whether you enter your promo code as lower, UPPER or Mixed case in the manager, it will be saved as lower case. Additionally, when customer enters a promo code on the front end, it is automatically lowered, regardless of whether they enter a lower, UPPER or Mixed version. This is also true for prefixes and suffixes of multi-coupon codes, both will be automatically lowered in the manager and on the front end.

Please note that if you create multiple promo codes in the manager that will be automatically lowered to be the same promo code, only the promo with the highest rank will apply. If the ‘[apply regardless of other promotions](#)’ box is checked and you have multiple promotions in the manager that will be automatically lowered to the same code, all corresponding promotions will be applied to the the sale.

This is relative to build 45.2016.2.0.



## Testing your Promotions

After setting up a promotion, it is a good idea to test out how your promotion is working on your site. A good way to do this is to attach a coupon code that only you know to your promotion and then enter the code on the front end of your site against various baskets to see how the promotion responds. You don't need to complete a transaction just fill a few baskets and see what happens when the basket loads before the final payment step of checkout

Important considerations when testing a promotions could include:

- How promotion reacts to already discounted items
- How promotion is affected by other promotions that may overlap
- How the promotion filters customers or baskets that are eligible for the reward