Web Link Help File:
Promotion Management

Abstract

➢ This help file will illustrate how to create, send and publish promotions.

Procedure

1) Login as Admin and navigate to the "Promotions" menu and click on "Send Promotions."(fig. 1)
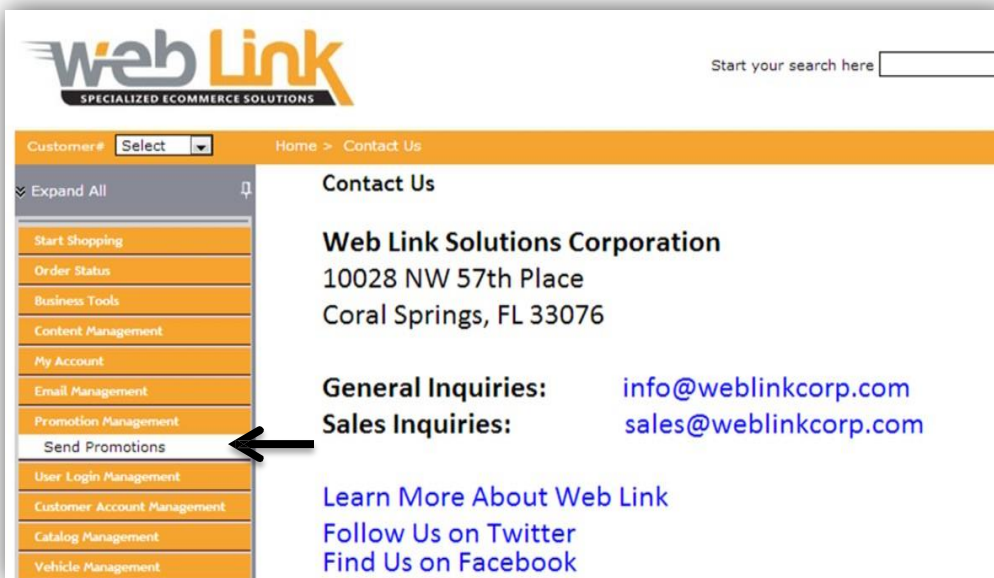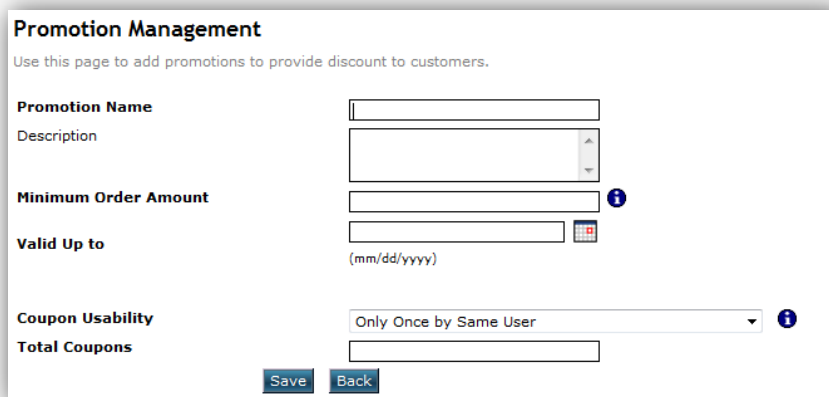2) Click the "Add new Promotion(s)" link. This opens the "Promotion Management" screen.(fig. 2)

fig.1

fig.2

3) Give your promotion a name.
4) Enter a description of the promotion.
5) Enter the "minimum order amount" that must be spent to redeem the promotion.
6) Enter the "Valid Up to" date which sets the time of expiration.
7) The "Coupon Usability" drop down menu offers the following four options for generating the promotion. These options can be viewed when hovering over the tool tip icon.

Private - Single Use: Send unique, auto-generated coupons to selected users via email that are good for one use prior to expiration.
Private - Unlimited Use:Send unique, auto-generated coupons to selected users via email that can be used multiple times until expiration.
Public - Single Use:Assign a coupon code of your choice to be distributed to the public and only used once per user prior to expiration.
Public – Unlimited Use:Assign a coupon code of your choice to be distributed to the public and can be used multiple times per user until expiration.

8) Enter the total number of coupons that can be redeemed for the promotion in the "Total Coupons" field. It is advisable to enter a large number (ie 9999) if either "only once by same user" or "multiple times by same user" was selected for "Coupon Usability" as these options send a separate and unique coupon code to each customer.
9) Click the "Save" button when finished. The page will reload and confirm that the new promotion was successfully added. Additional fields will be visible that will allow the administrator to define coupon amounts as well as which parts and customers will be eligible for the discount.
10) Discounts based upon order amount: From here the administrator can set the purchase range and discount amount that is either a percentage of the purchase price or a fixed value. If desired, multiple price ranges and discounts can be added to the promotion (ie 10% off for purchases between $15-$50 and 20% off for purchases between $51-$100). Click "Save" when completed. (fig. 3)

Promotion added successfully. Now you can define the coupon rules using the tools below. fig.3

Discounts Based upon Order Amount ⓘ

From($)	To($)	Discount	
15	50	10	⊙ Percentage ○ Fixed
51	100	20	⊙ Percentage ○ Fixed
			⊙ Percentage ○ Fixed
			⊙ Percentage ○ Fixed
			⊙ Percentage ○ Fixed
			⊙ Percentage ○ Fixed
			⊙ Percentage ○ Fixed
			⊙ Percentage ○ Fixed
			⊙ Percentage ○ Fixed
			⊙ Percentage ○ Fixed

Save   Clear

11) Qualifying Parts: This section is used to specify which parts are eligible for the promotion. The administrator can allow the coupons to be redeemed for purchase of any and all parts in the catalog or specify certain parts based on part number, line code, brand name, or category. (fig. 4)

fig.4

12) Qualifying Customers: This final section of the promotion management page allows the administrator to select which customers are eligible for receiving the promotion. All registered users may be made eligible, or only certain users may be selected by choosing them from the scrolling list box. Click the "Save" button at the bottom of the page to save all settings and return to the promotions list page where the new promotion will be presented. (fig.5)

fig.5

13) To send out the promotion, the administrator must click on either the "publish" or "issue" link at the far right column of the promotion to be sent. If one of the "private" options were chosen in the "Coupon Usability" section of the promotion management screen then several unique codes will be generated and the "issue" link will appear here. If one of the "public" options were chosen then only a single code will be generated for all customers to use and the "publish" link will appear. (fig. 6)

Name	Expiration Date	Total Coupons	Coupons Issued	Minimum Order Amount	Edit	Delete	Issue
Example Promo	8/31/2011	1	0	$1.00	📝	🗑	Publish
Coupon Promotion	6/30/2011	9999	0	$15.00	📝	🗑	Issue

fig.6

14) If clicking on a "publish" link then the "Publish Coupon" screen will load. Here the administrator can assign a coupon code of his/her choice that can be sent out by email, promoted on the website or elsewhere on the internet. (fig. 7)

Publish Coupon
This coupon has been setup to be used by multiple users. After assigning a Coupon Code, you can advertise this promotion by providing it to the public.

fig.7

Promotion Name	Example Promo
Description	
Minimum Order Amount	1.00
Expiration Date	8/31/2011
Coupon Usability	Only Once by Multiple Users
Total Coupons	1

Enter Coupon Code 456   [Update] [Back]

15) When clicking on an "issue" link, the administrator will be brought to the "Issue Promotion Coupons" screen. From here a refined customer recipient list can be generated based on customer number, role, login date, purchase order amounts, and order dates. When finished click on the "Show" button to reveal the refined customer list. (fig. 8)

Issue Promotion Coupons

fig.8

Promotion
Coupon Promotion
10% off
Valid Till: 06/30/2011

Customer Refinement Criteria:

Customer#: [Contains ▼] [default]

Role [-- Select -- ▼]

Login: [-- Select -- ▼] [   ] 📅
(mm/dd/yyyy)

Order Amount [Greater Than ▼] [500]

Order From: [   ] 📅   To: [   ] 📅
(mm/dd/yyyy)   (mm/dd/yyyy)

[Show] [Clear]

☐ Select	Name	Customer Number	Date Created	No of Orders	Order Total	Last Order Date	Coupons Issued
☐	Sample Customer	DEFAULT	12/12/2005	273	$14,964.57	04/13/2011	24
☐	Anonymous Anonymous	DEFAULT	12/12/2005	147	$2,679.66	03/09/2011	3
☐	Promotion Test	DEFAULT	8/12/2009	41	$1,848.02	11/03/2009	54
☐	Customer Admin	DEFAULT	10/27/2009	33	$1,666.81	03/11/2011	1

[Send Coupons]

16) Select the customers from the list that will receive the promotion by clicking on the appropriate check box in the first column and click the "Send Coupons" button at the bottom.

17) A Promotion Email Template pop up window will open where the administrator can select the email form that will be sent to the recipients from the drop down menu. After an email template is selected, clicking on the "go" button will display a preview of the email as it will appear to the customers. Click on the "send mail" button at the bottom of this screen to send the promotion emails. (fig. 9)

Note: You have control over the content of these templates. See training document on Email Management.
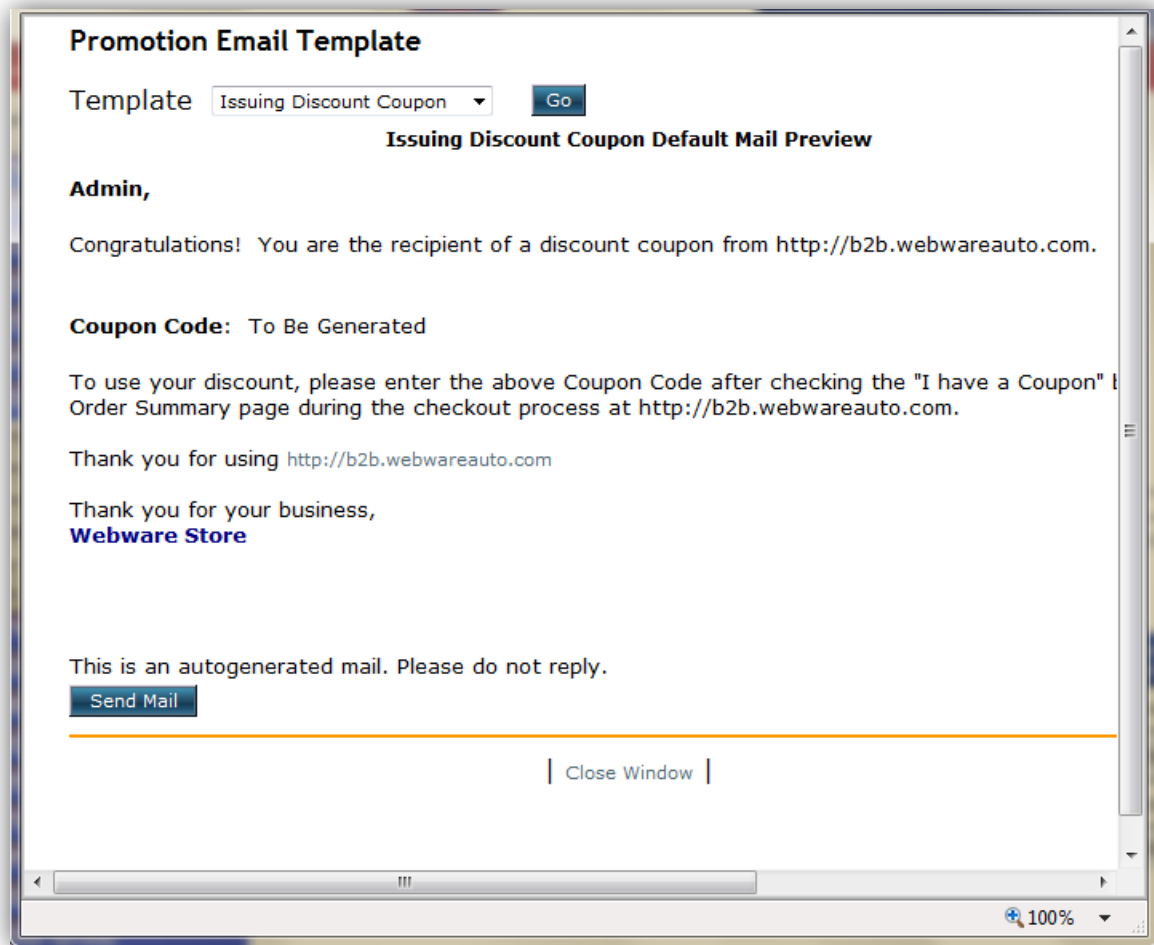
fig.9

Promotion Email Template

Template [Issuing Discount Coupon ▼]   [Go]

Issuing Discount Coupon Default Mail Preview

Admin,

Congratulations! You are the recipient of a discount coupon from http://b2b.webwareauto.com.

Coupon Code: To Be Generated

To use your discount, please enter the above Coupon Code after checking the "I have a Coupon" k
Order Summary page during the checkout process at http://b2b.webwareauto.com.

Thank you for using http://b2b.webwareauto.com

Thank you for your business,
Webware Store

This is an autogenerated mail. Please do not reply.

[Send Mail]

| Close Window |

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