

Promotion

SYSTEM

Functionalities

(Extended features included)

Promotion System Functionalities

Welcome to the updated **Promotion System Functionalities Reference Guide**, which now includes instructions for new extended features. The Promotions System is an **essential tool** for creating the Marketing programs that help drive our sales. This comprehensive guide will assist you in crafting your promotional programs and enable a smooth, more efficient workflow between the Marketing, Price Control, and Information Systems departments.

There are many different types of sales promotions that you can create and each one has its own characteristics and requirements. The **Promotion System Functionalities Reference Guide** can help you choose when, where and how to use each one, and instruct you on the information needed on your work order/job request form. This way, **all promotions are entered into the system in the proper manner**.

Please familiarize yourself with the contents of this guide and share it with the relevant new and current TSMs in your department.

Promotion System Functionalities

Line Level—No Charge Item

Option 1:



Definition: Buy item X, get item X at no charge

Scenarios:


- a) Buy item X of the same, get item X of the same at no charge (Family set not applicable as this is a line level)
- b) Buy item X, get A and B at no charge (A and B can be different item codes)

Note: Creator needs to specify the “buy” and “get” (Note: The customer cannot choose the “get”)

Examples:

a)

Buy...



Buy item X

Get...



Get Item X

b)

Buy...



Buy item X

Get...


&


Get A & B

Option 2:



*(without choice capabilities)**

***Important:** Customer does not have the option to choose no charge item if placing order on the Web. (Works only on the Telesales Green Screen Order Entry.) For Web orders, the creator must specify the specific no charge item.

Definition: Buy X quantity, customer chooses the “get” no charge item from a specified list of sku’s

Note: Creator needs to identify the options of the “get” and the defaulted item

Example:

Buy...



Buy item X

Get...


or

or


Choose any of the products here

Promotion System Functionalities

Family Set—No Charge Item

Option 1: (Does not work on Web)

Important: Customer does not have the option to choose no charge item if placing order on the Web.

Definition: Buy any quantity from the family set, get X at no charge


Scenarios:

- a) Buy any quantity from the family set, get X at no charge
- b) Buy any quantity from the family set, get A and B at no charge

Note: Creator needs to specify the “get”


Examples:

a)




Buy any 4 of these...

Get...




Get X at no charge

b)



Buy 2 of these...

Get...



Get A & B at no charge

Option 2:  (without choice capabilities)*

***Important:** Customer does not have the option to choose no charge item if placing order on the Web. (Works only on the Telesales Green Screen Order Entry.)

Definition: Buy any quantity from the family set, customer chooses the “get” no charge item from a specified list of sku’s

Note: Creator needs to identify the options of the “get”

As a general rule, if you set up a promotion at the family level, do not set up individual offers, otherwise duplicating of no charge item will occur. Enter promotion only at the family set level. (For example: if there was an additional offer such as a 3 + 1 on Medium only, there will be duplication.)

Example:

Buy 10, get 3 at no charge. Customer chooses no charge items.

Buy...



Buy any 10 of these...

Get...



Choose any of the products here

 = option available on the web

Promotion System Functionalities

Order Level—No Charge Offer

Option 1:



Important: No product choice on this option. If the price of a line is overridden, then it is not included in the qualifying \$X amount.

Definition: Spend \$X amount for the entire order (products can be anything—does not have to be in a family set), get item X at no charge

Scenarios:

- a) Buy specific dollar amount, get X at no charge (specified “get”—no choice)
- b) Buy specific dollar amount, get A and B at no charge (specified “get”—no choice)

Note: Creator needs to specify the dollar amount and the “get”

Examples:



Option 2:



Important: If the price of a line is overridden, then it is not included in the qualifying \$X amount.

Definition: Spend \$X amount for the entire order (products can be anything—does not have to be in a family set), customer chooses the “get” from a specified list of sku’s

Note: Creator needs to identify the options of the “get”

Example:



No charge items are limited to each qualifying offer. Customer will not get additional no charge items if order level exceeds the minimum requirements.



= option available on the Web

Promotion System Functionalities

Mix and Match Order Level—No Charge Offer

Order \$X amount from a specified group of products, get X at no charge

Scenarios:

- a) Buy specific dollar amount, get X at no charge
- b) Buy specific dollar amount, get A and B at no charge

Note: Creator needs to specify the “get” and the dollar amount



Mix and Match Order Quantity—No Charge Offer

Buy a quantity of item(s) from a specified group of products, get X at no charge

Note: Creator needs to specify the “get” items



No charge items are limited to each qualifying offer. Customer will not get additional no charge items if order level exceeds the minimum requirements.



= option available on the Web

Promotion System Functionalities

Other:

All options have capability to set limits (how many times a customer can receive discount or no charge goods).

Example: *Five times for the duration of the promotion*

Example: 10+2 (buy 10, get 2 at no charge)—Customer can only take advantage of this offer “X” amount of times. Creator and Price Control can limit the number of no charge goods going out.

Promo Header Explanation & Offer Information

The following must be provided to Price Control when requesting a promo code:

- 1) Job Number
- 2) Job Name
- 3) Start and End Date
- 4) Specify if targeted (Targeted pieces need to be loaded into Siebel)
- 5) Job Type (ie: Mailer/Fax/Flyer)
- 6) Default to Web (EZ=Dental /OK=Medical /LL=Lab)
- 7) Offer (digital format preferred)



= option available on the Web

Promotion System Functionalities Phase 2

Extended Features

Targeted Campaign

- This is a promotional campaign that is directed to a targeted group of select customers through a unique promo code.
- Marketing to determine list criteria, then works with data analytics to pull the specified list of customers. Marketing then uploads this list into the Siebel Campaign.
(Each marketing division should appoint a specific person to manage the Siebel entries and/or uploads.)
- Price Control creates a promo header on AS400. Once the final list is uploaded, it requires 48 hours to review, verify counts, and submit the promotion for activation.
- If a targeted campaign needs to be extended, it must be done in both Siebel and the AS400 System before the promo expires.

Promotion System Functionalities Phase 2

Extended Features

Marketing Programs

- This is usually an ongoing promotion that works only at the item and family level.
Cannot be used on Order Level promotions.
- The promo code is set to a specified group of customers. The customer list can be loaded and amended throughout the life of the marketing program.
(The customer does not need to mention a promo code to receive discounted pricing and no charge offers.)

Limiting a Promo Code by Division

- A promo code can be limited to the Division, Telesales, or Web.
- The same promo code can be given to more than one Division (i.e., cross-divisional offers).

Extending, Expiring, and Copying Promotions

- Any active promotion can be extended only before the expiration date.
- Any active promotion can be expired on any given day during the life of the promotion.
- Any active or recently expired (within one year) promotion can be duplicated into a different promo code.
- All changes will need a 24-hour activation period.

Promotion System Functionalities Phase 2

Extended Features

Promo Order Discounts



Promo must be used at the Header Level.

Will need qualifying dollar or percentage discount and can be tiered:

Example:

Spend \$100 ---- Receive 5% off

Spend \$200 ---- Receive 10% off

Spend \$300 ---- Receive 15% off

Spend \$100 ---- Receive \$10 off

Spend \$200 ---- Receive \$20 off

Spend \$300 ---- Receive \$30 off

Exclusions:

If any override of the item price is given, the line will be excluded from the qualifying total dollar amount.

Mix and Match Discount



Works the same as Promo Order Discount, but Marketing must specify the items that the discount applies to.

Examples:



a) Buy \$100 of these products, get 10% off these items



b) Buy \$100 of these products, get \$10 off

Exclusions:

If any override of the item price is given, the line will be excluded from the qualifying total dollar amount.



= option available on the Web

Promotion System Functionalities Phase 2

Extended Features

Promotion Price

A promotion can be priced at the family set or line level.

Upload Templates

Marketing can now provide their pricing and/or no charge goods in an excel spreadsheet to be uploaded.

- A. Promo Price
- B. Promo No Charge
- C. Divisional Price
- D. Default No Charge Goods
- E. Mix/Match No Charge Goods

The use of these templates will reduce the need for manual entry and will provide a final overview report with details. The report will also outline any exceptions pertaining to the promotion.

