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A Detailed Explanation of all Promotion Options



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2 years ago · Updated

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This article gives a detailed explanation of every option available in the promotions editor. The options follow the promotions editor from top to bottom, so either scroll down to find what you're looking for or use the search function of your browser.

- An overview of how promotions work can be found [here](#).
- Examples of common promotions can be found [here](#).

Generic options

Help

Name	Description
<input type="text"/>	<input type="text"/>
Restrict to agents	
<input type="text" value="Select agents"/>	
Billing Code	Minimum access level required to apply promotion
<input type="text"/>	<input type="text" value="Production"/>

Name

The name of the promotion that will be displayed inside the POS, the reports and on the receipts. The name must be between 2 and 45 characters long and is required.

Description

The description field is only visible inside the editor. Here you can add notes about the description to further explain it. The description cannot be more than 5000 characters long.

Restrict to Agents

Here you can select one or more of your agents. When a promotion is restricted to an agent you cannot apply it to orders/customers without that agent.

Billing Code

The billing code allows you to summarize invoices and statements by promotion(s). Use in conjunction with the **Summarize by Billing Code** setting under Settings > Business Settings > System Settings > Invoice Settings.

Minimum access level require to apply promotion

Here you can select what access level an employee must have to be allowed to apply the promotion to an order or a customer. If no minimum level access is set, the promotion defaults to the **Production** access level.

Maximum usage options on order level

Maximum uses per customer	Maximum discounted amount	Restrict promotion by timeframe
# ∞	\$ ∞	<input checked="" type="checkbox"/> Today ▼

Maximum uses per customer

This puts a limit on how many orders for a single customer a promotion can be used. If the limit is reached the promotion the system will give you a warning that the promotion cannot be used any more for that customer.

In case **Restrict promotion by time frame** is enabled, the use count is only limited within the time frame. When the time frame interval loops around, the use count for the customer is reset.

Maximum discount amount

If this value is defined, an order with this promotion will never receive a total discount larger than this value. For example, if a promotion giving 10% off, with this value is set to \$1, is applied to a \$20 order, the discount would only be \$1 even though 10% off \$20 is \$2.00.

In case **Restrict promotion by time frame** is enabled, the maximum discounted value is counted over multiple orders within the time frame instead of only being counted for a single order. When the time frame interval loops around, the discount value count for the customer is reset.

Restrict promotion by time frame

This option allows you to select a time frame, e.g. a date interval, for what order data the "max limit counters" described in this section will use when calculating their values when the promotion is used. Three types of time frames exist:

1. **This "period"** (today, this week, this month, this quarter, this year)

This sets the interval to a fixed period. If **This month** is selected and the promotion is used on an order on the 11th of March, the max limit counters will use data from orders between March 1st and March 28th.

2. **Last N Days** (last 7 days, last 30 days, last 3 months)

This sets the interval relative to when the promotion is used on an order. If **Last 7 Days** is selected and the promotion is used on an order on the 11th, the max limit counters will use

data from orders between the 4th and the current order.


3. Subscription Billing Cycle

This is meant to be used together with the subscription system. The interval will follow the billing dates of the subscription, i.e. the start date of the interval will be the same date as the subscription order activation date, and the end date the day before the subscription renewal date.

Note that you need to check the checkbox in order for the dropdown menu to show.

Date and time options

Normally promotions can be applied and used any time. These options allow you to put restrictions on when a promotion can be used.

<input checked="" type="checkbox"/> Only valid through specified dates <div>  May 31, 2021 - July 1, 2021 ▼ </div>	<input checked="" type="checkbox"/> Only valid during specific days / times of week <table> <tbody> <tr> <td><input checked="" type="checkbox"/> Mondays</td> <td>from</td> <td>12:00</td> <td>AM ▼</td> <td>to</td> <td>12:00</td> <td>PM ▼</td> </tr> <tr> <td><input checked="" type="checkbox"/> Tuesdays</td> <td>from</td> <td>12:00</td> <td>AM ▼</td> <td>to</td> <td>12:00</td> <td>PM ▼</td> </tr> <tr> <td><input checked="" type="checkbox"/> Wednesdays</td> <td>from</td> <td>12:00</td> <td>AM ▼</td> <td>to</td> <td>12:00</td> <td>PM ▼</td> </tr> <tr> <td><input checked="" type="checkbox"/> Thursdays</td> <td>from</td> <td>12:00</td> <td>AM ▼</td> <td>to</td> <td>12:00</td> <td>PM ▼</td> </tr> <tr> <td><input checked="" type="checkbox"/> Fridays</td> <td>from</td> <td>12:00</td> <td>AM ▼</td> <td>to</td> <td>12:00</td> <td>PM ▼</td> </tr> <tr> <td><input checked="" type="checkbox"/> Saturdays</td> <td>from</td> <td>12:00</td> <td>AM ▼</td> <td>to</td> <td>12:00</td> <td>PM ▼</td> </tr> <tr> <td><input checked="" type="checkbox"/> Sundays</td> <td>from</td> <td>12:00</td> <td>AM ▼</td> <td>to</td> <td>12:00</td> <td>PM ▼</td> </tr> </tbody> </table>	<input checked="" type="checkbox"/> Mondays	from	12:00	AM ▼	to	12:00	PM ▼	<input checked="" type="checkbox"/> Tuesdays	from	12:00	AM ▼	to	12:00	PM ▼	<input checked="" type="checkbox"/> Wednesdays	from	12:00	AM ▼	to	12:00	PM ▼	<input checked="" type="checkbox"/> Thursdays	from	12:00	AM ▼	to	12:00	PM ▼	<input checked="" type="checkbox"/> Fridays	from	12:00	AM ▼	to	12:00	PM ▼	<input checked="" type="checkbox"/> Saturdays	from	12:00	AM ▼	to	12:00	PM ▼	<input checked="" type="checkbox"/> Sundays	from	12:00	AM ▼	to	12:00	PM ▼
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Only valid through specified dates

With this option enabled the promotion can only be used between the start and end dates selected within the date range picker. You must select both a start date and an end date. Every order created within the time range is eligible to have the promotion applied, even if it happens retroactively.

Note that you need to check the checkbox in order for the date range picker to show.

Only valid during specific dates / times of week

With this option enabled you can select specific weekdays and time slots the promotion can be applied to an order. Every order created within the valid time slots is eligible to have the promotion applied, even if it happens retroactively.

Note that you need to check the checkbox in order for opening hours menu to show.

Coupon options

The coupon options applies when the promotion is selected to be **Usable as a coupon** and is applied to an order. Read more about promotion types [here](#).

☒ Usable as a coupon

Coupon code

Require scan

☐

Automatically apply when possible

☐

Coupon code

If you define a coupon code the system will generate a barcode that will be associated with this promotion. This barcode can be scanned in order to apply the promotion to an order.

Require scan

If enabled, the promotion can only be applied to an order by scanning the barcode. This mean that you cannot select it in the promotion dropdown list on an order.

Automatically apply when possible

If enabled, the promotion will automatically be applied to all orders matching the Activation Requirements of this promotion (described further down). Note that using this option will likely require you to setting this promotion combinable with your other promotions.

Customer Discount options

The customer discount options applies when the promotion is selected to be **Usable as a customer discount** and is applied to a customer account. Read more about promotion types [here](#).

☒ Usable as a customer discount

Days valid after attached to customer

#

∞

Coupon code

☐ Attach automatically to new customers

☐ Visible on customer website

☐ Only valid on first order for new customers

☐ Allow customer to set themselves

Days valid after attached to customer

If this value is defined, the promotion will only be active on that customer for that many days from the day it was applied to the customer account. After that it will stay on the customer account, but will not give any discount to their orders.

Attach automatically to new customers

If enabled, all newly created customer accounts will have this promotion applied. Use in conjunction with **Days valid after attached to customer** to create *"Get 10% off all your orders first month after signup"* types of promotions.

Only valid on first order for new customers

If enabled, this promotion will only be applied to the first order for newly created customer accounts.

Coupon Code

If you define a coupon code the system will generate a barcode that will be associated with this promotion. You can generate links with this barcode/promo code/coupon code or email it to select customers to allow them to apply the promotion to their accounts if **Allow customer to set themselves** is enabled.

Visible on customer website

If enabled, a customer will be able to see on the customer website that this promotion is attached to their account. They cannot add, remove or modify it.

Allow customer to set themselves

If enabled, a customer will be able to type in the coupon code on the customer website to attach it to their account. They cannot remove or modify it.

Promotion combinations

Hide combinations

This promotion can currently not be combined with any other promotion, and will always stay as the single promotion on an order or customer account. Edit the combinations to change this.

Customer discounts	Coupons
<input type="checkbox"/> <i>Select all</i>	<input type="checkbox"/> <i>Select all</i>
<input type="checkbox"/> 10% off	<input type="checkbox"/> 10% off
<input type="checkbox"/> 50% off	<input type="checkbox"/> 50% off
<input type="checkbox"/> Free	<input type="checkbox"/> Free

Here you can select what other combinations the promotion should be combinable with. By default a promotion is not combinable with any other promotion. See this [link](#) for an explanation on how combinable promotions interact.

If a promotion is usable as both a coupon and a customer discount it must be combinable with both the types. The system will check both checkboxes automatically.

Note that you need to click the Show combinations button in order to see the combinations.

Activation Requirements

The **activation requirements** are conditions that decide if a promotion can be applied to an order. See this [link](#) for an explanation on how that works and how **activation requirement overrides** work. This section will describe the different options available to you.

Promotion
Add override

Activation Requirements

These requirements need to be fulfilled in order for the promotion to be applied to an order. No such requirements exist by default.

×

HAS

×

Item Types

Select one or more items

×

Min Number of Items

Minimum number of items on the order

+ Add another restriction

×

AND NOT

×

Departments

Select one or more departments

+ Add another restriction

×

OR HAS

+ Add requirement

+ Add restriction

Must set at least one restriction or requirement

+ Add requirement

You can combine multiple conditions as activation requirements. The conditions are divided into two categories:

1. Requirements

Requirements is how you combine restrictions into logical units. A requirement can consist of either restrictions or sub-requirements. A requirement can have a negating operator, allowing you to say *"Apply this promotion on all orders not having more than 4 shirts"* for example. To negate a requirement select **NOT** instead of **HAS**.

You can combine different requirements by either requiring all of them to be fulfilled, or by requiring some of them to be fulfilled. You control this behavior by choosing either **AND** or **OR** in front of the requirement. Sub-requirements allow you to combine both OR- and AND-clauses (e.g. parentheses in a mathematical sense).

2. Restrictions

Restrictions define a single condition on the order. They are described further right below. A

single requirement can have multiple restrictions, and they all need to be fulfilled in order for the requirement to be fulfilled.

To create an activation requirement press the **Add requirement** button. To add a restriction, press the **Add another restriction / Add restriction** button within the requirement. To add a sub-requirement, first remove all restrictions from the requirement and then press the **Add requirement** button within the requirement.

Restrictions

There are 6 different restrictions. Each of them can only be used once in a single requirement. Combine them within a single requirement create effects like *"4 shirts"*. The restrictions are:

1. Item Types

The promotion will only be applied to orders having at least one item with one of these item types.

2. Departments

The promotion will only be applied to orders having at least one item belonging to one of these departments.

3. Min number of items

The promotion will only be applied to orders having at least this many items.

4. Max number of items

The promotion will only be applied to orders having less than this number of items.

5. Minimum price

The promotion will only be applied to orders having a total price of at least this amount.

6. Maximum price

The promotion will only be applied to orders having a total price less than this amount

Discount Effects

The **discount effects** decides how and what items the promotion will affect (rather than if the promotion can be applied to the order at all – that's what the **activation requirements** does). You can have multiple discount effects on a single promotion, read more about that [here](#).

Discount Effect

These options describe how and what the promotion will affect.

Discount Effect

Add additional effect

Include surcharges

Include alterations

Include Exclude Only

Include Exclude Only

Effect

Maximum amount discounted

Percentage off % 0

\$ ∞

Apply discount on

Include items required for activation

Maximum number of items discounted

Single items Item sets

☒

∞

Discount items matching the criteria below

Add requirement

Include surcharges / alterations

These options decide how the promotion will handle surcharges and alterations, respectively. There are three options:

1. **Include**

The surcharges / alterations will be included and be discounted like normal items.

2. **Exclude**

The surcharges / alterations will not be included and they will not receive any discount.

3. **Only**

The surcharges / alterations will be the only things discounted on orders with this promotion.

Note that for a surcharge to be discounted the surcharge itself must be selected to be discountable from the surcharge settings menu.

Effect

This is the monetary effect that will be applied to the orders. This is a required field. There are three types of monetary effects:

1. **Percentage off**

This gives a flat percentage off the price of every item / item set.

Example: 10% off, gives an order with 2 items at \$6 each, a final price of \$5.4.

2. Dollars off

This gives a fixed amount off the price of every item / item set, or a fixed amount off the total price of the order. This will never reduce the price below zero.

Example: \$5 off every item, gives an order with 2 items at \$6 each, a final price of \$2.

Example: \$5 off total price, gives an order with 2 items at \$6 each, a final price of \$7.

3. Fixed price

This sets the price of every item / item, or the total price, to a fixed amount. You cannot set a negative amount.

Example: Each item fixed at \$5, gives an order with 2 items at \$6 each, a final price of \$10.

Example: Total price fixed at \$5, gives an order with 2 items at \$6 each, a final price of \$5.

You can create a "Free" promotion by setting percentage off to 100%, or by setting a fixed price to \$0.

The reason you don't see the option to select items / item sets or total for percentage off is that mathematically this is the same thing.

Maximum amount discounted

If this value is defined, the current discount effect will never yield a discount amount larger than this value. For example, if the effect is 10% off, with this value is set to \$1, this will only discount the order by \$1 even if the items / items sets has a total price higher than \$10.

*Note that this only affects the current discount effect. To set a limit on the total discounted amount for the entire order, see **Maximum amount discounted** described in the **Max usage** section above.*

Maximum number of items / item sets discounted

If this value is defined, the current discount effect will never affect more items than this value. For example, if this value is set to 5, and the order has 6 items that can be discounted, only the first 5 will receive the discount.

Apply discount on

Here you select if your discount effect will affect single items or sets of items (e.g., sets of 2 shirts and 1 pair of pants).

Include items / item sets required for activation

Disabled this option to exclude items that are required to fulfill the activation requirements from being discounted. This can be used to create *"Buy 3 pay for 2"* or *"All shirts after the first 3 are 50% off"*.

Discount items / item sets matching the criteria below

This is where you select what items / item sets will be discounted by the current discount effect. It has large similarities with the **activation requirement** structure described earlier.

Single Items

If you have selected that the discount effect will affect **single items**, the options will look like this:

Discount items matching the criteria below

×

IS

×

Item Types

▼

Select one or more items

×

Departments

▼

Select one or more departments

+

Add another requirement

You can combine multiple conditions to describe what items will be affected. The conditions are divided into two categories:

1. Requirements

Requirements is how you combine restrictions into logical units. A requirement can have a number of restrictions. A requirement can have a negating operator, allowing you to say *"This affects every item that is not a shirt"* for example. To negate a requirement select **NOT** instead of **IS**.

2. Restrictions

Restrictions define a single condition on an item. They are described further right below. A single requirement can have multiple restrictions, and the item need to match all of them in order to be discounted.

To create an activation requirement press the **Add another requirement / Add requirement** button. To add a restriction, press the **Add another restriction / Add restriction** button within the requirement.

Restrictions

There are 6 different restrictions. Each of them can only be used once in a single requirement. Combine them within a single requirement create effects like *"4 shirts"*. The restrictions are are:

1. Item Types

The discount effect will only be applied to items of the selected item types

2. Departments

The discount effect will only be applied to items belonging to the selected departments.

Item Sets

If you have selected that the discount effect will affect **item sets**, the options will look like this:

Discount item sets matching the criteria below

2

×

IS

×

Item Types

Shirt DC

+

 Add another restriction

+

 Add another requirement

×

1

×

IS

×

Item Types

Pants

+

 Add another restriction

+

+

The difference is that you, at the top most level in the structure, create item set pieces instead of requirements. Each item set piece will have the same structure/options as a **single item** and also a numerical value to denote how many of that set piece is required.

In the image above you can see an item set consisting of 2 shirts and 1 pair of pants.



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Promotion Example: Get first 2 sets of 5 t-shirts for \$2.99, get each additional set for \$0.99

Promotion Example: 10% off all pants on Fridays

Promotion Example: Get shirts for \$1 off and pants for \$2 off

Examples of some common promotions

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