Cart Discount Promos

Overview

Cart Discount promotions can be created to give your customers either a percentage or dollar discount on their order. To be eligible, the customer simply needs to meet a minimum spend requirement.

If you like, you can even exclude certain products from the promotion. Excluded products will not count toward the spend requirement, and may or may not be discounted.

In the example below, we'll create a Cart Discount promotion for 20% off orders over $250. This promo will exclude exercise machines.

This article assumes you've already got the Promotion Codes feature enabled for your website. If you haven't, please contact us to switch it on for you.

Step-by-step guide

1. *In the CMS, navigate to* **Campaigns & Promotions Promotion Codes**.

2. *Click '***Add Promotion Code***'.*

   ⊞ Add Promotion Code

3. *Select* **Promotion Type** *=* **Cart**.

4. *Next, decide whether your customer will get a* **dollar** *or* **percentage discount** *and select your scenario accordingly. Our example will use the % discount.*

   When I spend X dollars then I get a Y dollar discount

   The customer gets a discount of a certain dollar amount once they spend over a minimum amount.

   When I spend X dollars then I get a Y percentage discount

   The customer gets a discount of a certain percentage of the order total once they spend a minimum amount.

5. *Enter the* **Promotion Code** *(no spaces). This is what your customer enters at checkout to redeem the promo.*

   Promotion Code *

   20off250

   ❓ The code that the end user enters into the 'Apply Promotion Code' field

6. *Give the promotion a* **description**. *This will be displayed in the user's order summary during checkout.*

   Description *

   20% off orders over $250

   ❓ The description of the promotion code when it is displayed on the cart and order summary

7. Specify **Start and End dates**. Click the calendar icon to launch the date picker.

Start Date

| 29/06/2017 12:00 AM | 📅 🕐 |

End Date

| 29/06/2018 12:00 AM | 📅 🕐 |

8. Enter the **Spend Threshold** (the $ amount they must spend), and the associated **Discount % or $** amount.
(Our example only requires one level of discounting, but if you're interested in multi-level discounts, see our article on *Tiered Promotions*.)

Discount Thresholds

Spend Threshold	Discount %	
250	20	x

Note that the spend requirement is based on the inc-GST total for B2C, and the ex-GST total for B2B. Also note that for B2B scenarios, any customer-based discounts will still be honoured; this discount will be **on top** of that.

9. Next you can specify **products to be excluded**. Click **Add** and specify products you want to **exclude from the spend calculation**. Specify by:
   - Product code
   - ERP stock group
   - Product category
   - ERP price code
   - Or a combination of all of the above!

Type	Item	
Category ▼	exerc	x
● Add	(SX010101) Sports & Outdoors > Fitness > Exercise Machines	

10. Finally, decide whether you want to **'Discount these exclusions'**?
Excluded products don't count toward the required spend, but you can still allow them to attract the discount if you choose. Otherwise, leave the option unticked to exlude them from the discount as well as the spend threshold.

☐ Discount these exclusions?

11. Click '**Add**' again to specify more products if required.}

12. **Save & Exit**.

Your cart discount promo is now ready to go!

Advanced options

*Each promotion has several advanced options you may wish to configure. These can be accessed immediately after you create the promo, by navigating to **Options Edit Advanced Options**.*

🏷 Promotion Codes	⊕ Options
✓ New promotion code setup successfully!	⊞ New Promotion Code
	⚙ Edit Advanced Options

Or if you're editing an existing promo, they'll be located in a collapsed section below the main promo details:

⊕ Advanced Options

- **Status** - *Active / Disabled / Deleted*
- **Applied To** - *B2C / B2B / Both*
- **Criteria Fail Remove promo Code** - *automatically remove the promotion code from the cart when the contents get updated and requirements are no longer met.*
- **Not Applicable With Other Offers** - *prevents the code from being used on orders where other promotion codes are already applied.*
- **Free Product To Be Added in Pronto** - *(for free product promos only) the free product must be manually added to the sales order once it has integrated to PRONTO. Only note lines containing the Promotion Code and Description will be added to the order if this option is enabled.*

Usage Limits

*You can set the max number of times the promo code can be used, either by an individual **User**, users on a particular **Customer** Code, or **Globally** (site-wide). Leaving these limits at 0 = unlimited use by all.*

From version 4.10+, you can also specify a user (or comma-separated list of users) who are permitted to use the promotion code. Any user not in this list will be unable to apply the promo to their order.

Usage Limits

User Usage Limit

0	+ −

Customer Usage Limit

0	+ −

Global Usage Limit

0	+ −

User List

tobias@bluemangroup.com,gob@magiciansalliance.com,buster@bluth.com

Messages

There are default messages set at the promotion code feature level, but these can be overridden for each individual promotion. Leaving these blank will use the defaults.

- **Promo Code No Longer Applies Message** - *The notification displayed when the promo code was previously applied, but the user has updated their cart contents such that they are no longer eligible for the promotion.*
- **Promotion Code Error Message** - *The notification displayed when the promo code can't be applied. Perhaps the cart value is not high enough, or the user hasn't purchased the minimum quantity.*
- **Promotion Code Applied Message** - *The notification displayed when the promo code is successfully applied to the user's cart.*

Advanced Options

Misc

Status

Active

Applied To

B2C and B2B

☑ Criteria Fail Remove Promo Code
☐ Not Applicable With Other Offers
☐ Free Product To Be Added In Pronto

Usage Limits

User Usage Limit

0   +
         −

Customer Usage Limit

0   +
         −

Global Usage Limit

0   +
         −

Messages

Promo Code No Longer Applies Message

Promotion Code Error Message

Promotion Code Applied Message

We recommend that Promotion Codes be configured on your Stage site and thoroughly tested to ensure behaviour is as expected.

Additional Information

Cart Discount Promos can now be configured to exclude products, product groups, or product categories from the promotion.

There are also additional advanced options that you can configure for promotions. They become available after the promo is created.

Minimum Version Requirements	3.75.00
Prerequisites	This article assumes you've already got the Promotion Codes feature enabled for your website. If you haven't, please contact us to switch it on for you.
Self Configurable	Yes
Business Function	Promotions
BPD Only?	Yes
B2B/B2C/Both	Both
Ballpark Hours From CV (if opting for CV to complete self config component)	Contact CV Support
Ballpark Hours From CV (in addition to any self config required)	Contact CV Support
Third Party Costs	n/a
CMS Category	Campaigns & Promotions Promotion Codes

Related articles

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