Cart Discount Promo Codes

Overview

Cart Discount promotion codes 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.

> ⓘ The Promotion Codes feature must be enabled for your website. On BPD sites, you can do this at **Settings Payment & Checkout Promotion Codes**

Step-by-step guide

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

2. On the top right of the screen, click '**Add Promotion Code**'.

   ➕ Add Promotion Code

3. From **Select Promotion Type**, select **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

   ❷ 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

   ❷ 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. **NOTE -** *If start and end dates are not set, the promotion code cannot be used. An error message will display when the customer tries to apply the code during checkout.*

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 Promotion Codes.)

Discount Thresholds

Spend Threshold	Discount %	
250	20	×

✓ *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

| Category ▼ |

Item

| exerc | × |

(SX010101) Sports & Outdoors > Fitness > Exercise Machines

⊕ Add

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 exclude them from the discount as well as the spend threshold.

    ☐ Discount these exclusions?

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

12. *Click* **Save & Exit**.

Your cart discount promo is now ready to go!

Promo Codes - Additional Options

Access Additional Options

To access Additional Options:

While in the saved promo code, navigate to **Options Edit Additional Options**.

Promotion Codes

✓ New promotion code setup successfully!

⊕ Opt

□ New Promotion Code

⚙ Edit Additional Options

OR

If editing an existing *promo code, scroll down its page and open the collapsed* **Additional Options** *section.*

⊕ Additional Options

Misc

- **Status** - *the current status of the promo code*
  - **Active:** *the promo code is live on your site and can be used by customers. It has not been disabled or deleted.*
  - **Disabled:** *the promo code cannot be used by customers. You can switch it to 'Active'*
  - **Deleted:** *the promo code is deleted from use altogether and is kept for historical records only. (****NOTE -*** *A deleted promo code can be undeleted to 'disabled' and then reactivated.)*

- **Criteria Fail Remove Promo Code**
  - **ON**: *the promo code is automatically removed from the cart when contents get updated and promo requirements are no longer met. Users must re-enter the promo code if they want the code to be applied;*
  - **OFF**: *the promo code remains in the cart when requirements are not met, If contents get updated and requirements are now met, it will be (re-)applied.*

- **Not Applicable With Other Offers;**
  - **ON**: *promo code cannot be used when other promo codes have already been applied to the order;*
  - **OFF**: *promo code can be used when other promo codes have been applied to the same order.*

  > ⓘ **IMPORTANT**
  >
  > *Letting customers use more than one promotion code in an order must first be enabled by Commerce Vision. Contact CV Support and request stacked promotions to be enabled.*

- **Free Product To Be Added in Pronto** (applies only for Promo Codes that add a free product)

  For Promo Codes with free products, you can choose between adding the free product online upon order submission or in the ERP (Pronto) when the order is integrated. Toggle ON or OFF **Free Product To Be Added in Pronto**. *Default: OFF*

  ⬤━ Free Product To Be Added In Pronto

  In the order placed, received and confirmation emails, how the free product is displayed depends on the option selected.

○ *When OFF, the free product is added online. In the emails, the free product displays as an item with a cost of $0.00 in the product order line of your Order Summary*

Commerce Vision BPD

Order Received

Web Reference: 100011804

Thanks for your order! It's currently with our Customer Service team for review; you'll receive an email confirmation with the order number shortly. In the meantime, if you have any questions, please contact us and quote web reference number (100011804).

Order Summary

Item		Qty	Price (inc GST)	Unit	Discount	Total (inc GST)
	Tie-Waist Medical Scrub Trousers Code: CV153	1	$18.99	Each	0.00%	
	Shoe Covers - Box of 100 Code: CV152	1	$0.00	BOX	0.00%	
Free shoe covers with this order						

Subtotal (inc GST)	$18.99
Discounts	-$0.00
Free shoe covers with this order	
Freight	$11.50
Total (inc GST)	$30.49
Including GST	$2.78

○ *When ON, the free product is added in the ERP. When you toggle ON this setting, confirm you want the free product added in the ERP.*

⚙ **Free Product to be added in ERP?**   ⊗

Are you sure you want to Activate Free Product to be added in ERP? WARNING: This action will remove all the `Free Product` added in CMS.

                 ⊗ Cancel   ✓ Confirm

NOTE - *Scroll up to the 'Free Product' fields. The fields are now empty and disabled. The free products you previously added for this promo code still apply.*

Free Product

Product Code

[▾]

Qty *

[   ]

❓ ✏

The Order Placed, Received and Confirmation emails by default will not display the free product separately in an order line in Order Summary.

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Order Received

Web Reference: 100011800
Thanks for your order! It's currently with our Customer Service team for review; you'll receive an email confirmation with the order number shortly. In the meantime, if you have any questions, please contact us and quote web reference number (100011800).

Order Summary

Item		Qty	Price (inc GST)	Unit	Discount	Total (inc GST)
🩳	Tie-Waist Medical Scrub Trousers Code: CV153	1	$18.99	Each	0.00%	
			Subtotal (inc GST)			$18.99
			Discounts			-$0.00
→			FREE PRODUCT TEST			
			Freight			$11.50
			Total (inc GST)			$30.49
			Including GST			$2.78

*To add a note line about the free product in the Order Summary section, toggle ON the '**Show Note Lines on Individual Lines?**' option in the Email Order Summary widget for any applicable email template (e.g., Order Received, Order Placed, Order Confirmation). The Promotion Code and Description will be added to the Order Summary.*

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Order Received

Web Reference: 100011803
Thanks for your order! It's currently with our Customer Service team for review; you'll receive an email confirmation with the order number shortly. In the meantime, if you have any questions, please contact us and quote web reference number (100011803).

Order Summary

| Item		Qty	Price (inc GST)	Unit	Discount	Total (inc GST)
🩳	Tie-Waist Medical Scrub Trousers Code: CV153	1	$18.99	Each	0.00%	
FREEPRODUCT Free shoe covers with this order						
			Subtotal (inc GST)			$18.99
			Discounts			-$0.00
			Free shoe covers with this order			
			Freight			$11.50
			Total (inc GST)			$30.49
			Including GST			$2.78

NOTE - *For the free product and quantity to appear as an order line item in the sales receipt, they must be added to the sales order manually in Pronto after integration.*

- **Postcode Exclusion List** - (for free freight promo codes only) *If required, enter single postcodes and/or postcode ranges (each comma-separated) to exclude. Follow Australia Post's four digit conventions so a three digit code would be '0200' instead of '200'.*

Roles

Include or exclude the promo code based on whether customers are B2B, B2C or both.

For versions lower than 4.31

⚥ Roles

Applied To

B2C and B2B
B2C
B2B
B2C and B2B

Applied To: Select customer group: B2B, B2C or both.

For versions 4.31+

⚥ Roles

To limit this promo code by Role, added Role(s) must be of the role type(s) selected in Applied to e.g. if B2C was selected in Applied To, Roles selected must be B2C ones.

Applied To

B2C and B2B

❷ ✎

Role	Delete?

➕ Add Role

⬤〇 Promo active for all roles excluding the ones listed above

❷ ✎

- **Applied To:** *Select customer group: B2B, B2C or both.*

- **Roles:** *(For versions 4.31+) Specify Role(s) for the selected customer group(s) Click* **Add Role** ➕ **Add Role** *,
then in the dropdown, select the* **Role**. *If another role is needed, repeat this step.* **IMPORTANT-** *For added Roles to be valid, they must fall under the customer group added in 'Applied To'.*
- **Promo active for all roles excluding the ones listed above:** *If OFF, the added roles* can *apply the promo code. If ON, the added roles* cannot *apply the promo code.*

⬤〇 **Promo active for all roles excluding the ones listed above**

Usage Limits

Limit the maximum number of times the promo code can be used. For unlimited use, leave at the default of '0'.

*- **User Usage Limit:** limit the number of times an individual user can apply the promo code (available only if the promo code is for B2B users)*

*- **Customer Usage Limit:** limit the number of times an individual Customer Code can apply the promo code*

*- **Global Usage Limit:** limit the total number of times the promo code can be used site-wide.*

*- **User List:** (For versions 4.10+) You can also specify one or more users (comma-separated list) who can use the promotion code.* **NOTE -** *If one or more users are added, any user* not *in this list cannot apply the promo code 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

Customer List (4.34+)

Customer list allows you to restrict a promo code to specific customer accounts.

Customer List

Customer Code

[   ]

[● Add]   [⬆ Import Customer List]

Customer Code

To add a customer manually:

1. In Customer Code, start typing a Customer Code, and select from the dropdown list.

2. Click **Add**. The added Customer Code is listed below.

   Customer List

   Customer Code

   [   ]

   [● Add]   [⬆ Import Customer List]

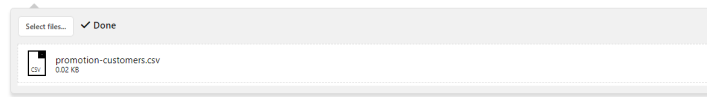   **Customer Code**

   | AACAB | x |
   | WAFFA | x |

3. Continue adding one code at a time, if needed.

4. To save, click **Save & Exit**.

To add Customers in bulk:

1. Create a CSV file with the Header 'Code' as the first column

2. Populate the column with the required Customer Codes.

3. Click **Import Customer List**.

4. Follow the instructions to upload the csv file.

5. Check the Import Log to ensure there are no error messages.

Messages

Default messages to users are set at the promotion code feature level. These can be overridden for a specific promotion code. Leave blank to use defaults.

- **Promo Code No Longer Applies Message:** Displays when the promo code previously successfully applied is no longer valid because the cart contents have changed.
- **Promotion Code Error Message:** Displayed when the cart contents are not eligible for the promo code, e.g., the cart value is not high enough or the minimum quantity has not been reached.
- **Promotion Code Applied Message:** Displayed when the cart contents are valid for the promo code.

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

Additional Information

Specific products, product groups, or product categories can be excluded from the promotion.

Minimum Version Requirements	3.75.00
Prerequisites	Promotion Codes feature enabled.
Self Configurable	Yes
Business Function	Promotions
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- Promo Codes - Additional Options
- Mixed Product Buy Pricing Promotion
- Online Discounts
- Promotions
- Whole Order Discounts
- Delete expired Promo Codes
- Buy X Quantity of a Product and Get Y Quantity of Specific Product at Special Price
- Cart Discount Promo Codes
- Free Product Promo Codes
- Promotion Codes Overview
- Free Freight Promo Codes
- Repeating Promo Codes
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