

Whole Order Discounts



Prerequisites

This feature

- is available for sites on versions 4.07+
- must be switched on for your site by [Commerce Vision](#).

Overview

Give your customers an incentive to order online! Our Whole Order Discount feature is designed to offer users a discount on their total order value, irrespective of any existing ERP-based discounts or special pricing they may already receive









How it works


1. You configure percentage discounts in the CMS. There are several criteria on which the discount can be based:

- *Customer Code*
- *Company Mask/Code*
- *Industry SubGroup*

Wildcards are permitted, meaning you can configure a discount for all customers with a filter for just particular Company Masks, for example. This would make that discount applicable across multiple accounts.

+ Add new record

| Customer Code | Company Mask | Industry Sub Group | Discount Rate % | Charge Line Type | Charge Line Description | |
|---------------|--------------|--------------------|-----------------|------------------|--------------------------------|--|
| % | % | A | 2.00 | 5 | Subgroup A Discount | <div> Edit  Delete</div> |
| % | 555 | % | 4.00 | 7 | 555 Group Discount | <div> Edit  Delete</div> |
| ABC | % | | 3.00 | 2 | Web discount for ABC Customers | <div> Edit  Delete</div> |
| MINING | % | % | 10.00 | 8 | Discount for customer MINING | <div> Edit  Delete</div> |




If a customer satisfies the criteria for multiple Whole Order Discounts, the system will only apply one. First it will look for an explicit Customer Code match, and if there is none (i.e. wildcards in use), it will proceed to the Company Mask and then to Industry Sub Group.

Example - in the screenshot above, Customer 'ABC' has a 3% discount configured. Customer ABC is also part of the '555' Company Mask group, which has a 4% discount configured for all customers. In this scenario, only the 3% discount would be applied, as it has been defined specifically for that customer and would be the first discount identified by the system.

2. The user automatically receives the discount in the cart, without having to apply any promotion codes.

In the image below, you can see this customer already receives a 5% discount on the product. The Whole Order Discount is then applied at the **order level** (not against a product).

| Product | Qty | Price (ex GST) | Unit | Discount | Tot |
|--|--|----------------|------|----------|-----|
|  Balance Rocker Code: CV201 ✔ In Stock <small>Includes free Bonus Item: CV203 - Platform Stilts - 6 Pairs Qty: 4</small> | <div>4</div> <div> <input type="button" value="Add Note"/> <input type="button" value="Add to Favourites"/> <input type="button" value="Update"/> <input type="button" value="Remove"/> </div> | \$65.99 | Each | 5.00% | |

Have A Promo Code?

Subtotal (ex GST)
 Web discount for ABC customers
 Plus GST
Total (inc GST) \$2

3. The discount is recorded against the sales order as a negative charge line.

You specify the charge line type and its description, which appears both in the cart and on the ERP sales order.

| Standard | | | | | | | | | | | |
|--|----------------|------------|------|------------|--|-----|--|-----|---------------|---|----------------------------|
| Order Details Customer: ABC Name: The ABC Trading Company Whse: NDC National Distribution Centre Status: On Hold Pricing: W/Sale Tax No.: | | | | | Order Totals Pack Weight: 0.000 No. of items: 2 | | Totals in Local Inc Tax: 281.57 Ex Tax: 255.97 GST: 25.60 G/P%: 100.00% | | | | |
| Seq. | Item Code | Order Qty. | Unit | Item Price | Unit ... | Per | Disc | GST | Inc Tax Total | O | Line Desc |
| 1.00 | CV201 | 4 | EACH | 65.9900 | EACH | 1 | 5.000% | 1 | 275.84 | | Balance Rocker |
| 2.00 | CV203 | 4 | SET | 0.0000 | SET | 1 | | 1 | 0.00 | | Platform Stilts - 6 Pairs |
| 901.00 | Charges Type 2 | | | | | | | 1 | -8.27 | | Web discount for ABC Cus |
| 909.00 | Charges Type 0 | | | | | | | 1 | 14.00 | | Australia Post (orders ove |


| Line Details | | | | Pricing | |
|--------------------------------------|-------------|----------------------|----------------|------------|--|
| Type: Charge | Print Flag: | Attached Line Notes: | Supplier: | Qty UOM: | |
| Desc: Web discount for ABC Customers | | | Group: | Price: | |
| | | | Charge Type: 2 | Price UOM: | |
| | | | GTIN: | Pack: | |
| Info: | | | Avail. Stock: | Conv: | |


Step-by-step guide

NOTE - This feature must first be enabled by [Commerce Vision](#).

1. Enable Whole Order Discount

1. In the CMS, navigate to **Settings Feature Management**.
2. Search for **Whole Order Discount**, or select the **Payment & Checkout** tab.
3. If the feature is not available, click the **Contact to Enable** button to get in touch with us.
4. If the feature IS available, click **Configure**, toggle the feature **on**, then **Save**.


Whole Order Discount Settings


 Enable Whole Order Discount

2. Configure a discount

1. Navigate to **Campaigns & Promotions** **Whole Order Discount**.

2. Click the **Add new record** button.

3. Enter the values as required:

- **Customer Code** - the customer account code in the ERP (use wildcard '%' for ALL customers).
- **Company Mask** - the Company Mask / Company Code value recorded against the Customer in the ERP (use wildcard '%' for ALL customers).
- **Industry SubGroup** - the Industry group recorded against the Customer in the ERP (leave blank if you don't use this field, or use wildcard '%' for ALL customers).
- **Discount Rate %** - the discount percent
- **Charge Line Type** - the ERP charge line type for the discount at the sales order level
- **Charge Line Description** - the description displayed in the cart and recorded against the charge line on the sales order.
- **Start Date / End Date** - start and end dates of the discount, if required.

| Customer Code | Company Mask | Industry Sub Group | Discount Rate % | Charge Line Type | Charge Line Description | Start Date | End Date | |
|---------------|--------------|--------------------|-----------------|------------------|-------------------------|------------|------------|--------|
| ABC | % | | 5.00 | 6 | Web discount for ABC | 10/09/2020 | 10/12/2020 | Update |

4. Click **Update** to save.

Additional Information

This discount is web-based, and is automatically applied to the cart - without the user needing a promotion code or coupon at checkout.

| | |
|------------------------------|------------|
| Minimum Version Requirements | 4.07.00 |
| Prerequisites | -- |
| Self Configurable | Yes |
| Business Function | Promotions |
| BPD Only? | Yes |
| B2B/B2C/Both | B2B |
| Third Party Costs | n/a |

Related help

- [Mixed Product Buy Pricing Promotion](#)
- [Promotions](#)
- [Online Discounts](#)
- [Promo Codes - Additional Options](#)
- [Promotion Codes Overview](#)
- [Repeating Promo Codes](#)
- [Free Freight Promo Codes](#)
- [Tiered Promotion Codes](#)
- [Delete expired Promo Codes](#)
- [Buy X Quantity of a Product and Get Y Quantity of Specific Product at Special Price](#)

