Tiered Promotion Codes

Overview

Promotion codes can be configured with tiers, or discount levels. As the user reaches the first spend threshold, they are eligible for the first tier of discounts. As their spend increases and they reach the next tier, the discount amount likewise increases. This allows configuration of varying discount levels within a single promotion code.

For example, a tiered promotion scenario might entitle the user to 10% off their order if they spend \$100 (tier 1). Once they reach the \$200 spend threshold, they are entitled to 25% off their order (tier 2). This scenario could continue on with an unlimited number of tiers, with each level attracting a new discount amount.

Product Categories 👻 Our Store 💙		Hooray! Promo code s	uccessfully applied to all eligible
		Save As Template II Hold Or	der 🛛 Ø Update Order 🛛 🛢 Remove Al
Code: CV389 Code: CV389 Code: CV389 Code: CV389 Code: CV389	1 - + Ø Add Note ★ Favourite Ø	\$13.25	\$13.25
Foolscap Manilla Folders, 100 Box Code: CV311 O In Stock	1 - →	\$15.19	\$15.19
Foolscap Document Wallets, 32mm Capacity, 50 Box code: CV312 © In Stock	1 - ◆ ● Add Note ★ Favourite	\$20.85	\$20.85
Have A Promo Code?	Sut Dis Piu Piu	ototal (ex GST) counts Tiered % promo example s GST	\$102.01 -\$10.20 \$9.19
	То	otal (inc GST)	\$101.00
		/ Request Quote	Continue To Checkout

Product exclusions may also be specified, so that particular products / categories / stock groups are not counted in the spend calculation. These excluded products may or may not be eligible to receive the discount, depending on configuration of the promotion.

Please note - Product Exclusions are only available with *percentage* discount promotions. Dollar discount promotions can be configured with tiers, but not exclusions at this stage.

Please be aware that there are also additional advanced options that you can configure for promotions. They become available after the promo is created. You'll find info on these under Advanced Options, later in this article.

Step-by-step guide

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In the following steps, we will configure a tiered percentage discount based on cart value:

- 1. In the CMS, navigate to Campaigns & Promotions Promotion Codes.
- 2. Click Add Promotion Code.
- Under promotion type Cart, select the percentage discount scenario ("When I spend X Dollars then I get a Y percentage discount").

4. Populate the standard promotion fields (Code, Description, Start & End dates).

Select Promotion Type:	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.	
Cart ¥	Promotion Code *	
Selected Scenario:	Demo	
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.	The code that the end user enters into the 'Apply Promotion Code' field Description	
When I spend X Dollars then I get a Y percentage	Tiered % promo example	
discount The customer gets a discount of a certain percentage of the order total once they spend a minimum amount.	The description of the promotion code when it is displayed on the cart and order summary	
	Start Date	
	1/03/2016 12:00 AM	()
	End Date	
	1/08/2016 12:00 AM	Ö

- 5. Next, enter the first tier's threshold and discount amounts:
 - Spend Threshold the amount the user must spend in order to qualify for the discount

ଚ	The threshold amount includes or excludes GST based on the customer. So for B2B customers, the
0	threshold would generally look at the ex-GST spend. For B2C, it would be GST-inclusive.

- Discount % the percentage discount applied to the order
- 6. Click Add Tier to enter the next discount level, following the same logic as the previous tier.

Spend Threshold	Discount %	
100	10	
200	20	
300	30	

- 7. Continue adding tiers as required. Click the Re-Order By Threshold option to reorder the tiers numerically if needed.
- 8. Specify any required exclusions. Product Exclusions are not counted in the threshold calculation. They can be specified by:
 Product
 - Stock Group
 - Category
- 9. Finally, indicate whether excluded products are discounted:
 - unticked exclusions will not count toward the spend threshold and will NOT have the discount applied
 - ticked exclusions will not count toward the spend threshold, but WILL have the discount applied Product Exclusions

Tune	Item	
type	item	
Product	• CV101	
Stock Group	▼ ELEC	
Category	▼ SX0302	
🕀 Add		

10. To finish, Cclick Save & Exit. A confirmation message that setup was successful displays.

🔗 Promotion Codes	O Options	💷 Return to List
	New Promotion Code	
✓ New promotion code setup successfully!	O Edit Advanced Options	

Error rendering macro 'excerpt-include'

No link could be created for 'Promo Codes - Advanced Options'.

Additional Information

Specific products / categories / stock groups can be excluded in the spend calculation.

Minimum Version Requirements	3.85.00
Prerequisites	The Promotion Codes feature must be enabled for your website.
Self Configurable	Yes
Business Function	Campaigns & Promotions
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- Mixed Product Buy Pricing Promotion
- Promo Codes Additional Options
- Promotions
- Importing Products to a Promotion
- Free Product Promo Codes
- Product Discount Promo Codes
- Repeating Promo Codes
- Cart Discount Promo Codes
- Whole Order Discounts
- Buy X Quantity of a Product and Get Y Quantity of Specific Product at Special Price

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Product Categories V Our Store V		Hooray! Promo code succe products.	ssfully applied to all eligible
Lateral Filing Labels, A-Z, 180 Pack Code: CV389 In Stock	1 - ◆ ● Add Note ★ Favourite C	\$13.25 D Update O Remove	\$13.2
Foolscap Manilla Folders, 100 Box Code: CV311 O In Stock	1 - → ♦ Add Note ★ Favourite	\$15.19 D Update	\$15.1
Foolscap Document Wallets, 32mm Capacity, 50 Box Code: CV312 O in Stock	1 - + © Add Note * Favourite C	S20.85	\$20.8
Have A Promo Code?	Su Di Pic	btotal (ex GST) counts Terred Ni promo example is GST	\$102.0 -\$10.2 \$9.1
	T	otal (inc GST)	\$101.00
	Check out with PayPa	🖌 🖪 Request Quote	Continue To Checkout

Product exclusions may also be specified, so that particular products / categories / stock groups are not counted in the spend calculation. These excluded products may or may not be eligible to receive the discount, depending on configuration of the promotion.

Please note - Product Exclusions are only available with *percentage* discount promotions. Dollar discount promotions can be configured with tiers, but not exclusions at this stage.

Please be aware that there are also additional advanced options that you can configure for promotions. They become available after the promo is created. You'll find info on these under Advanced Options, later in this article.

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- 2. Click Add Promotion Code.

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- 3. Under promotion type Cart, select the percentage discount scenario ("When I spend X Dollars then I get a Y percentage discount").
- 4. Populate the standard promotion fields (Code, Description, Start & End dates).

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	Promotion Code *	
Selected Scenario:	Demo	
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When I spend X Dollars then I get a Y percentage	Tiered % promo example	
discount The customer gets a discount of a certain percentage of the order total once they spend a minimum amount.	The description of the promotion code when it is displayed on the cart and order summary	
	Start Date	
	1/03/2016 12:00 AM	0 1
	End Date	
	1/08/2016 12:00 AM	()

- 5. Next, enter the first tier's threshold and discount amounts:
 - Spend Threshold the amount the user must spend in order to qualify for the discount

The threshold amount includes or excludes GST based on the customer. So for B2B customers, the threshold would generally look at the ex-GST spend. For B2C, it would be GST-inclusive.

Discount Thresholds			1
Spend Threshold		Discount %	
100		10	×
200		20	×
300		30	×
• Add Tier × Re-Order B	y Thresold		
Specify any required ex Product Stock Group Category Finally, indicate whethe	clusions. Product Exclusio r excluded products are dis	ns are not counted in the thresh scounted:	old calculation. They can b
Specify any required ex Product Stock Group Category Finally, indicate whether unticked - exclus Product Exclus	clusions. Product Exclusio r excluded products are dis lusions will not count towa ions will not count toward	ns are not counted in the thresh scounted: rd the spend threshold and will i the spend threshold, but WILL h	old calculation. They can b NOT have the discount app nave the discount applied
Specify any required ex Product Stock Group Category Finally, indicate whethe unticked - exclus Product Exclus	clusions. Product Exclusio r excluded products are dis lusions will not count toward sions	ns are not counted in the thresh scounted: rd the spend threshold and will i the spend threshold, but WILL h	old calculation. They can b NOT have the discount applied
Specify any required ex Product Stock Group Category Finally, indicate whethe unticked - exclus Product Exclus Discount thes Type	clusions. Product Exclusion r excluded products are dis lusions will not count towar ions will not count toward sions e exclusions?	ns are not counted in the thresh scounted: rd the spend threshold and will i the spend threshold, but WILL h	old calculation. They can b NOT have the discount app nave the discount applied
Specify any required ex Product Stock Group Category Finally, indicate whether unticked - exclus ticked - exclus Product Exclus Type Product	clusions. Product Exclusion r excluded products are dis lusions will not count toward sions will not count toward sions e exclusions? Item T CV101	ns are not counted in the thresh scounted: rd the spend threshold and will i the spend threshold, but WILL h	old calculation. They can b NOT have the discount app have the discount applied
Specify any required ex Product Stock Group Category Finally, indicate whether unticked - exclus Product Exclus Discount thes Type Product Stock Group	clusions. Product Exclusion r excluded products are dis lusions will not count toward sions e exclusions? Item CV101 T ELEC	ns are not counted in the thresh scounted: rd the spend threshold and will i the spend threshold, but WILL h	old calculation. They can b NOT have the discount app nave the discount applied
Specify any required ex Product Stock Group Category Finally, indicate whether unticked - exclus Product Exclus Discount thes Type Product Stock Group Category	clusions. Product Exclusion r excluded products are dis lusions will not count toward sions e exclusions? Item CV101 CV101 ELEC SX0302	ns are not counted in the thresh scounted: rd the spend threshold and will i the spend threshold, but WILL h	nold calculation. They can b NOT have the discount app have the discount applied
Specify any required ex Product Stock Group Category Finally, indicate whether unticked - exclus Product Exclus Discount thes Type Product Stock Group Category	clusions. Product Exclusion r excluded products are dis lusions will not count toward sions e exclusions? Item CV101 T ELEC SX0302	ns are not counted in the thresh scounted: rd the spend threshold and will i the spend threshold, but WILL h	NOT have the discount applied
Specify any required ex Product Stock Group Category Finally, indicate whethe unticked - exclus Product Exclus Discount thes Type Product Stock Group Category Add	clusions. Product Exclusion r excluded products are dis lusions will not count toward sions e exclusions? Item CV101 ELEC SX0302	ns are not counted in the thresh scounted: rd the spend threshold and will i the spend threshold, but WILL h	old calculation. They can b NOT have the discount app have the discount applied
Specify any required ex Product Stock Group Category Finally, indicate whether unticked - exclus Product Exclus Discount thes Type Product Stock Group Category Add	clusions. Product Exclusion r excluded products are dis lusions will not count toward sions e exclusions? Item CV101 ELEC SX0302	ns are not counted in the thresh scounted: rd the spend threshold and will i the spend threshold, but WILL h	old calculation. They can b NOT have the discount app nave the discount applied
Specify any required ex Product Stock Group Category Finally, indicate whether unticked - exclus Product Exclus Discount thes Type Product Stock Group Category Add To finish, Cclick Save 8	clusions. Product Exclusion r excluded products are dis lusions will not count toward sions e exclusions? Item CV101 ELEC SX0302	ns are not counted in the thresh scounted: rd the spend threshold and will i the spend threshold, but WILL h	old calculation. They can l NOT have the discount ap nave the discount applied

The new promotion code is now ready to go!

Access Additional Options

To access Additional Options:

While in the s	aved promo code, navigate to Options Edit Additional Options .		(Ontion
	✓ New promotion code setup successfully!	0	New Promotion Code Edit Additional Options
OR			
If editing an e	kisting 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



Web Reference: 100011804

Thanks for your orderl 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	вох	0.00%	
Free shoe cove	ers with this					
order						
		Subtotal	(inc GST)			\$18.99
		Discoun	ts			-\$0.00
		Free sho	e covers with	this order		
		Freight				\$11.50
		Total (in	GST)			\$30.49
		Includio	OST			\$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 F	Product to be added in ERP?	⊗
Are you sure you CMS.	u want to Activate Free Product to be added in ERP? WARNING: This action will remove all the `Free Product` added in	
	Cancel Confirm	
NOTE - Scroll previously add	up to the 'Free Product' fields. The fields are now empty and disabled. The free products ded for this promo code still apply.	you
Free Product		
Product Code		
Qty *		
0 🥖		

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

Commerce Vision BPD								
Order	Received							
Web Reference Thanks for you the order numb (100011800).	e: 100011800 ir orderi It's currently with our Customer Servic per shortly. In the meantime, if you have any qu immary	e team for review; you'll review; you'll reviewtions, please contact us	eive an em and quote v	iail confirma web referen	tion with ce number			
Item		Qty F Qty (inc C	rice ST) Unit	Discount	Total (inc GST)			
A	Tie-Waist Medical Scrub Trousers Code: CV153	1 \$1	3.99 Each	0.00%				
					640.00			
		Subtotal (inc GS	· /		\$10.99			
		Discounts	,		-\$0.00			
		Discounts	TTEST		-\$0.00			
		Discounts FREE PRODUC Freight	r test		-\$0.00 \$11.50			
		FREE PRODUC Freight Total (inc GST)	TTEST		-\$0.00 \$11.50 \$30.49			

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.

	commerce Vision BPD 🛛 🖬 🛩 🔂 🦻 ằ in									
Orde	r Received									
Web Referen Thanks for yo the order nur (100011803).	nce: 100011803 our orderl I's currently with our Customer Service mber shortly. In the meantime, if you have any que	team for review; yo estions, please con	ou'll receive tact us and	an ema quote w	ail confirma veb referen	tion with ce number				
Item		Qty	Price (inc GST)	Unit	Discount	Total (inc GST)				
Item	Tie-Waist Medical Scrub Trousers Code: CV153	Qty 1	Price (inc GST) \$18.99	Unit Each	Discount	Total (inc GST)				
Item	Ter-Walst Medical Scrub Trousers Coder.CV153	Qty 1	Price (inc GST) \$18.99	Unit Each	Discount 0.00%	Total (inc GST)				
Item	Tis-Waint Medical Scrub Trovsers Code::CV153 ICCT errs with this oxder	Qty 1	Price (inc GST) \$18.99	Unit Each	Discount 0.00%	Total (inc GST)				
Item	Tis-Vitist Medical Scole Travers Code: CV153 ICT ens with this order	Qty 1 Subtotal	Price (inc GST) \$18.99 (inc GST)	Unit	Discount	Total (inc GST) \$18.99				
Item	Tis-Maist Medical Scub Trouess Code. CV153 ICT eres with this order	Qty 1 Subtotal Discoun	Price (inc GST) \$18.99 (inc GST) Is	Unit Each	Discount	Total (inc GST) \$18.99 -\$0.00				
Item	Ter-Weist Medical Scrub Trouvers CodeCV153 ICCT vers with this order	Qty 1 Subtotal Discount Free sht	Price (inc GST) \$18.99 (inc GST) Is be covers with	Unit Each	Discount	Total (inc GST) \$18.99 -50.00				
Item	Tre-Waist Medical Scrub Trousers CodeCV153 ICT evens with this order	Qty 1 Subtotal Discourt Free sht Freight	Price (inc GST) S18.99 (inc GST) Is be covers with	Unit Each	Discount	Total (inc GST) \$18.99 -\$0.00 \$11.50 \$20.49				

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

க் Roles	Applied To	
	B2C and B2B	
	B2C	
	B2B	
	B2C and B2B	
Applied To: Select customer group: I	B2B, B2C or both.	
For versions 4.31+		
Å Balas	Applied To	
To limit this promo code by Role, added Role(s) must be	B2C and B2B	
of the role type(s) selected in Applied to e.g. if B2C was selected in Applied To, Roles selected must be B2C ones.	Ø 🥖	
	Role	Delete?
	Add Role	
	Promo active for all roles excluding the ones listed above	
· · · · · · · · · · ·		
• Applied Io: Select custome	r group: B2B, B2C or both.	
Boloo: (For versions 4.31.)	Specify Deleve) for the selected systemet group(s) Click Add Pole	than
in the dropdown, select the	Role. If another role is needed, repeat this step, IMPORTANT- For added Roles to be valid	d.
they must fall under the cust	omer group added in 'Applied To'.	-)
 Promo active for all roles e the added roles cannot apply 	xcluding the ones listed above: If OFF, the added roles can apply the promo code. If O. y the promo code.	Ν,
	al an fan all an lan an da d'an she an an llata da barra	
Promo ac	tive 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 Add Import Customer List	
Customer Code	
AACAB	×
WAFFA	×

- 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

	Α	В	С	D	E	F	G	н	1.1	J	K	L	M	N	0	Р	Q
1	Code																
2	AACAB																
3	WAFFA																
4																	

- 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.

	Select file. V Done gromotion-customers.cov grow pool 48
i≡ Import Log	Import Successful

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 Promotion Code Applied Message: Displayed when the cart contents are valid for the promo code.
 Promotion Code Applied Message: Displayed when the cart contents are valid for the promo code.

Additional Information

Specific products / categories / stock groups can be excluded in the spend calculation.

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Prerequisites	The Promotion Codes feature must be enabled.
Self Configurable	Yes
Business Function	Promotions
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

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- · Buy X Quantity of a Product and Get Y Quantity of Specific Product at Special Price